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REPORTS ON FOREIGN MARKETS FOR AGRICULTURAL PRODUCTS

UNITED STATES DEPARTMENT OF AGRICULTURE
BUREAU OF MARKETS
FOREIGN MARKETING INVESTIGATIONS

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NOTE

IN THESE REPORTS ALL CONVERSIONS OF FOREIGN PRICES INTO U. S. MONEY HAVE BEEN MADE AT THE PAR VALUE OF THE FOREIGN MONEYS WITHOUT REGARD TO CURRENT EXCHANGE.

THE WORLD WHEAT SITUATION

With Special Reference to Prices and Stocks

Inquiries received by the Bureau of Markets manifest a widespread interest in the wheat situation of the world and the position of the American wheat industry in world trade. The Bureau's Division of Foreign Markets has endeavored to assemble from various official sources the most complete information possible relative to the supply, foreign trade, guaranteed prices, and freight rates to the principal markets.

During the war all the principal governments of the world took action to increase the production and to control the distribution of wheat and wheat products. Production was encouraged by the guarantee to the producer of a minimum price or by fixing a minimum selling price, while the distribution was made by governmental agencies working in cooperation with the Inter-Allied Food Commission.

TABLE 1.- Production and Foreign Trade of Wheat by Fiscal Years,
Giving the 3-Year Average, 1911-1913, and the Production for 1918

Country	Average for prewar period, 1911 - 1913			1918
	Production (bushels)	Net exports (bushels)	Net imports (bushels)	Production (bushels)
Algeria.....	33,198,000	.....	.....	49,199,000
Argentina.....	166,521,000	100,963,000	.....	219,431,000
Australia.....	88,961,000	52,318,000	.....	114,866,000
Austria-Hungary	247,141,000	1,034,000	.....	199,220,000
Canada	228,933,000	110,903,000	.....	189,301,000
Chile.....	21,409,000	1,933,000	.....	28,292,000
Egypt.....	35,792,000	.....	.....	32,555,000
France.....	324,137,000	.....	54,487,000	233,781,000
Germany.....	160,237,000	.....	67,381,000	90,330,000
India.....	369,946,000	59,565,000	.....	379,829,000
Italy.....	190,840,000	.....	58,644,000	176,368,000
Japan.....	26,305,000	.....	4,396,000	32,923,000
Roumania.....	88,418,000	53,223,000	.....	78,658,000*
Russia in Europe and Asia.....	727,133,000	127,889,000	.....	721,106,000**
Spain.....	123,560,000	.....	4,295,000	135,709,000
United Kingdom..	61,297,000	.....	221,352,000	93,099,000
United States....	704,995,000	115,847,000	.....	917,100,000
All others ^x	226,273,000	22,115,000	295,571,000	97,159,000
Total.....	3,825,096,000	645,790,000	706,126,000	3,788,926,000

*Roumania, estimate same as 1917.

**Russian estimate for 1918 same as 1917 estimate of Bureau of Crop Estimates.

^x"All others" includes Brazil, Belgium, Bulgaria, Denmark, Greece, Morocco, Netherlands, Portugal, Servia, Sweden, Switzerland, Tunis, Uruguay, Union of South Africa, etc., for which special official statistics are not available.

On June 30 the War Trade Board announced that, effective July 1, 1919, all control over the exportation and importation of wheat and wheat flour heretofore vested in the War Trade Board be transferred to and vested in the United States Wheat Director. All outstanding unused export or import licenses issued by the War Trade Board for wheat or wheat flour were revoked, effective July 1, 1919, and Collectors of Customs have been advised that said licenses are of no further force or effect. The War Trade Board announced further that wheat and wheat flour were removed on July 1, 1919, from the Export Conservation List and from the List of Restricted Imports of the War Trade Board.

All inquiries regarding the exportation or importation of wheat and wheat flour should be addressed to the United States Wheat Director, 42 Broadway, New York City.

Production and Foreign Trade

The average annual production, net exports, and net imports of wheat during the three fiscal years 1911 to 1913 for the principal countries for which statistics are available are shown in Table 1, together with the production for the same countries in 1918.

It will be noted that the production for the year 1918 as compared with the three-year average for 1911-1913 shows a decrease of only 36,170,000 bushels in the yield of the countries named. A practical comparison of the import and export trade of the world for the year 1918 with the exterior trade of the 3-year prewar period is not possible, owing to the distribution of wheat being in the control of governmental agencies, and official statistics in many cases not having been made available for publication.

Fixed Government Prices for Wheat in the Various Countries.

By 1917 the principal governments either had guaranteed a price to the producer or had fixed a minimum sale price. The price fixed or guaranteed by the governments for the years 1918 and 1919 are shown in Table 2. Where prices were fixed for the different grades of wheat, the average of these prices is shown as the fixed price for that country.

TABLE 2. -- Government Guaranteed Price per Bushel to the Producer or the Fixed Minimum Sale Price for the Years 1918 and 1919

Country	Guaranteed Price	Country	Guaranteed Price
Algeria.....:	\$2.36	Italy.....:	\$4.33
Argentina.....:	1.55*	Morocco.....:	1.58
Australia.....:	1.14	Netherlands...:	3.23
Austria-Hungary:	2.21	Portugal.....:	3.83
Brazil.....:	2.65	Spain,.....:	3.96
Belgium.....:	2.15	Sweden.....:	2.95
Canada.....:	2.245	Switzerland...:	3.25
Denmark.....:	1.97	Tunis.....:	3.25
Egypt.....:	2.67	United Kingdom:	2.28**
France.....:	3.94	United States :	2.395x
Germany.....:	2.10	:	:

*No guaranteed price was made by the Argentine Government to the producers, but a fixed minimum price for export wheat was established at \$1.55

per bushel.

**The British Government, under provisions of the "Corn Production Act" which became effective on August 21, 1917, fixed the minimum price of wheat to producers at \$1.65 per bushel, the maximum sale price for home-grown wheat at \$2.28 per bushel and the maximum for imported wheat at \$2.40 per bushel. The minimum sale price for 1919 has been fixed at \$2.16 per bushel.

xNo. 1 Northern Spring Wheat at New York.

Prices of Exporting Countries

The fixed minimum export price for Argentine wheat is \$1.55 per bushel at Buenos Aires, and the price for domestic consumption is about \$1.20 per bushel. While the British Government guaranteed a minimum price of \$1.14 to the Australian producers at Australian ports, three million tons were sold to the Imperial Government at \$1.16 per bushel, and other amounts at from \$1.50 to \$1.66 per bushel. Sales to Sweden have been made at \$1.40 per bushel and to India at \$1.34 per bushel, all at Australian docks, except shipments to India, which were to be delivered at Indian ports. The British Government's minimum guaranteed price to Australia for the season of 1919-20 is \$0.972 per bushel, and the Prime Minister of the Commonwealth has been authorized to offer the British Wheat Commission 74,666,667 bushels at \$1.20 per bushel.

Effect of War and Fixed Prices on Production

The combined effect of the war demands and the guaranteed prices on the principal wheat-producing countries are indicated in Table 3.

TABLE 3.-- Countries Showing Increased or Decreased Production for the Year 1918 as compared with the 3-Year Average, 1911-1913

Country	Production 1911-1913 (bushels)	Production 1918 (bushels)	Increase (bushels)	Decrease (bushels)
Algeria.....	33,198,000	49,199,000	16,022,000	.....
Argentina.....	166,521,000	219,431,000	52,910,000	.....
Australia.....	88,961,000	114,866,000	25,905,000	.....
Austria-Hungary..	247,141,000	199,220,000	.....	47,921,000
Canada.....	228,933,000	189,301,000	.....	39,632,000
Chile.....	21,409,000	28,292,000	6,883,000	.....
Egypt.....	35,792,000	32,555,000	.....	3,237,000
France.....	324,137,000	233,781,000	.....	90,356,000
Germany.....	160,237,000	90,330,000	.....	69,907,000
India.....	369,946,000	379,829,000	9,883,000	.....
Italy.....	190,840,000	176,368,000	.....	14,472,000
Japan.....	26,305,000	32,923,000	6,618,000	.....
Roumania.....	88,418,000	78,658,000	.....	9,760,000
Russia in Europe and Asia.....	727,133,000	721,106,000**	.....	6,027,000
Spain.....	123,560,000	135,709,000	12,149,000	.....
United Kingdom...	61,297,000	93,099,000	31,802,000	.....
United States...	704,995,000	917,100,000	212,105,000	.....
All others*	226,273,000	97,159,000	.....	129,114,000
Total.....	3,825,096,000	3,788,926,000	374,277,000	410,426,000

*"All others" includes Brazil, Belgium, Bulgaria, Denmark, Greece, Morocco, Netherlands, Portugal, Servia, Sweden, Switzerland, Tunis, Uruguay,

Union of South Africa, etc., for which separate official statistics are not available.

**1917 Estimate, Bureau of Crop Estimates.

It is noteworthy that countries showing increased production are those geographically removed from the seat of the war, and that the increase is in direct proportion to the attractiveness of the guaranteed prices. However, it is not reasonable to conclude that the increased production was caused entirely by the increase in the price, because in many cases there was little or no increase in the margin of profit. The effect of the war is clearly traced in the decreased production of those countries directly involved, which appears to be somewhat in proportion to the devastation wrought, and to the enforced withdrawal of men from agricultural pursuits. The only exception to this situation is Canada, which shows a decrease due to the partial failure of the 1917-18 crop. However, the table indicates a net decrease in production of 36,170,000 bushels for the year for all of the countries named as compared with the pre-war period.

Ocean Freight Rates for Wheat

One of the uncertain factors in marketing the world's wheat supply for the season of 1919 is the cost of ocean transportation. There is given below a comparative statement of the ocean rates from the principal exporting countries prior to the war and at the present time (Table 4):

TABLE 4.-- Ocean Freight Rates for Wheat per Bushel of 60 Pounds

From -	To-	Prewar rates	Present rates
United States:			
New York.....	Liverpool	\$0.0475	\$0.255
Pacific Coast...	do	....	.64
Gulf ports.....	do	....	.315
Canada:			
St. Johns.....	do	....	.30
India.....	do	.1075	.48
Argentina.....	do	.0833	.40
Argentina.....	New York	....	.72
Australia.....	Liverpool	.1675	.67
Australia.....	New York	....	.86
Australia.....	Seattle	....	.72
Australia.....	San Francisco:	....	.72

The rates named to Liverpool are the maximum rates fixed by the British Government and apply only to vessels flying the British flag. The rates to American ports are estimated from average charter quotations. The table is valuable only as indicating the position of grain rates and the fluctuation which may occur, especially downward toward the pre-war basis with the advent into the trade of the ships now on the ways.

Relative Cost of Foreign Wheat at U. S. Ports and at Liverpool

There is given below a table showing cost of foreign wheat at Liverpool and at ports of the United States, based on the fixed prices and fixed maximum ocean rates (Table 5).

TABLE 5.-- Relative Cost per Bushel of Foreign Wheat at United States Ports and at Liverpool

Exporting country	Price of exporting country	Estimated ocean freight	Relative cost
Argentina....	1.55*	\$0.72 to U.S. Eastern ports	\$2.27 at U.S. Eastern ports
Australia....	1.14	.86 do	2.00 do
do	1.14	.72 to U.S. Western ports	1.86 at U.S. Western ports
Argentina....	1.55	.40 to Liverpool	1.95 at Liverpool
Australia....	1.14	.67 do	1.81 do
Canada.....	2.245	.30 do	2.545 do
United States:	2.395**	.255 do	2.655 do

*Not guaranteed for entire season and subject to change.

**No.1 Northern Spring Wheat at New York.

Probable Effect of Exchange on Imports

Wheat bought in international trade must be paid for in gold or its equivalent. It is therefore important to know the current rates of exchange and how the price of wheat in each country may stand when expressed in terms of gold. This situation is illustrated in Tables 6 and 7.

TABLE 6.-- Equivalents of Foreign Currencies in \$1.00 of United States Gold

Country	At par	At exchange, June 14, 1919
France.....	5.18 francs	6.42 francs
Italy.....	5.18 lire	7.90 lire
Germany.....	4.2 marks	8.55 marks

TABLE 7.-- Comparative Fixed Prices at Par and at Exchange on June 14, 1919, with United States gold.

Country	Fixed minimum price per bushel of foreign wheat	Fixed minimum price (\$2.39½) per bushel of American wheat at New York	in units of foreign currency
	at par	at exchange on June 14, 1919	
France....	20.41 francs = \$3.94	12.41 francs:	15.38 francs
Italy.....	22.43 lire = 4.33	12.41 lire :	18.92 lire
Germany...	8.82 marks = 2.10	10.06 marks :	20.47 marks

The average rate of freight and insurance on wheat from the United States to the United Kingdom for the months of January, February, March, and April, 1919, was \$0.2725 per bushel. The average differential to European Atlantic ports would be 25 per cent additional, or \$0.3406 per bushel, and to Mediterranean ports 60 per cent or \$0.436 per bushel over the New York-Liverpool rate. If the wheat were delivered in American vessels, the rate of exchange on the cost of transportation should be included in the cost of the wheat delivered at foreign ports.

It will be noted that the fixed minimum price of wheat in gold is much higher in Italy and France than the fixed minimum sale price of \$2.39³/₈ per bushel at New York, but lower in Germany. It will be seen also that the governments of France and Italy may import American wheat and sell at their fixed minimum price at a profit to the government in local currency, but at a considerable drain upon their gold reserve.

The fixed minimum sale price of wheat in France amounts to 20.41 francs per bushel, or \$3.94 at par of exchange. The cost of American wheat at French Atlantic ports at the rate of exchange prevailing on June 14, 1919, amounts to approximately 17.62 francs, or \$2.745 per bushel, including the price of \$2.39³/₈ at New York and freight and insurance at \$0.35 per bushel. It is seen therefore that a margin of 2.79 francs or \$0.54 per bushel at par of exchange is left to France for the cost of interior distribution of American wheat. However, it will be noted that for every bushel of American wheat purchased by France and paid for at the rate of exchange prevailing on June 14, there would be a loss of 2.97 francs per bushel.

Table 7 indicates also that a gold dollar in Germany would buy 2³/₈ times as much domestic wheat as wheat imported from the United States at the rate of exchange on June 14, 1919. This situation will have the effect of inducing Germany and other countries with a depreciated currency, to keep down importations to the lowest possible quantity.

Notes on Estimated Stocks and Export Surpluses for the 1919-20 Market

AUSTRALIA.-- Statistics issued by the Australian Wheat Board and published in the "Pastoral Review" of March 15, 1919, show that since the Government took control of the wheat production, 466,462,000 bushels had been received into the Government pools up to March 3, 1919. Of this amount, 155,466,000 bushels had been shipped overseas, 115,999,000 bushels were consumed locally, leaving 195,017,000 bushels still on hand and available for export. The amount received into the pools includes 61,335,000 bushels from the 1918-19 crop, which was estimated at 76,000,000 bushels, none of which had been shipped overseas, and only 696,000 bushels of which had been absorbed locally. This would indicate that at least one-third of the accumulated stocks represented new wheat from the yield of 1918-19.

ARGENTINA.-- Official statistics published in the "Review of the River Plate" and confirmed by commercial estimates, place the surplus of wheat available for export during the market year 1919-20 at 156,095,000 bushels. (See Reports on Foreign Markets, No. 9, page 7).

CANADA.-- Although the wheat crop of Canada for last year was considered a partial failure, the exportations, including wheat and wheat flour, for the year ending March 31, 1919, amounted to 195,082,203 bushels. According to official estimates, the quantity of wheat on hand in the Dominion on March 31, 1919, was 118,543,000 bushels as compared with 77,023,000 bushels at the same date of the previous year. The area sown to winter wheat for the year 1918-19 is estimated at 840,000 acres as compared with 825,000 acres for the year 1917-18. However, the winter wheat production of Canada is a small portion of the total annual yield, and it has been officially stated by the Department of Agriculture at Ottawa that the acreage sown to spring wheat will bring the total up to approximately 16,958,000 acres, and that conditions on May 31 indicated a yield of 301,000,000 bushels. Therefore Canada may be expected to export a larger quantity than was exported during 1918.

UNITED STATES.-- The Bureau of Crop Estimates on June 14, 1919, estimated the yield of winter and spring wheat for the season of 1918-19 as 1,236,000,000 bushels, which would provide an export surplus of approximately 636,000,000 bushels.

ESTIMATED TOTAL EXPORTABLE SURPLUS.-- The estimated total exportable surplus of old and new wheat from the principal exporting countries of the world available for 1919 (July, 1919, - June, 1920) may be summarized as follows:

Argentina	bushels	156,095,000
Australia	"	195,017,000
Canada	"	299,543,000
Algeria	"	1,152,000
United States	"	636,000,000
Total wheat for export	"	1,287,807,000

In this connection it is of interest to know that some of the foremost grain experts of the world have estimated the import requirements of Europe for the season of 1919 at a minimum of 560,000,000 bushels and a maximum of 640,000,000 bushels, and this appears to be in agreement with the estimates of the Inter-Allied Food Commission of from 700,000,000 to 850,000,000 bushels of bread cereals, including both wheat and rye.

It is estimated that the removal of Russia, India, and Roumania from the list of exporting countries reduced the world's export surplus of wheat about 300,000,000 bushels, which is slightly above the figures given in Table 1.

Conditions in Russia and India

RUSSIA.-- The average yearly Russian exports of wheat during the prewar period, as shown in Table 1, amounted to 127,889,000 bushels. Six-sevenths of the supply originated in European Russia, the density of production being in the territory bordering on the Caspian and Black Seas and the waterway valleys of southeastern Russia in Europe. In October, 1917, the number of miles of Russian railways under the Soviet regime was 34,000, and in October, 1918, the mileage in operation had been reduced to 15,000. Owing to the transportation difficulties it may not be possible to market the wheat of southeastern Russia in the central and northern parts of the country, and it is thought possible that a portion of the grain may find an export outlet via the water routes.

According to a report of the American Consul at Vladivostok, dated January 31, 1919, the amount of grain in western Siberia is 237,243,300 bushels, the greater part of which is wheat, and that the exportable surplus will amount to 70,320,000 bushels. Here also, as in European Russia, the disturbed economic conditions, the interference of military operations, and the conditions of transportation may not permit the surplus to reach the markets of China and Japan in competition with the Australian supply. (See Reports on Foreign Markets, No. 2, page 4, "Chinese Market for American Flour").

INDIA.-- Owing to the failure of the last wheat crop, India has become a wheat importing country instead of supplying world markets with 35,042,000 bushels, as in 1918. India has imported from Australia 1,456,000 bushels of wheat, and shipments are now being made on another contract for 4,666,667 bushels for which the Government of the Commonwealth of Australia will furnish transportation.

REGULATIONS REGARDING THE CONSIGNMENT OF SHIPMENTS TO DENMARK

According to an announcement of the War Trade Board on June 20, shipments to Denmark have recently gone forward consigned to the Merchants' Guild of Copenhagen and to the Danish Chamber of Manufacturers, whereas such shipments should have been consigned directly to the actual consignees.

In view of the fact that consignment to these associations causes inconvenience to the associations and delay in releasing the goods to the actual consignees, instructions have been issued to the Collectors of Customs to permit shipments to Denmark only when the commodities are consigned directly to the actual consignees.

The attention of exporters is further directed to War Trade Board Ruling 784, issued June 18, 1919, giving the details of Special Export License RAC-81, permitting the shipment of nonconserved commodities to Denmark.

WAR TRADE BOARD REMOVES RESTRICTIONS ON TRADE WITH LATVIA AND LITHUANIA

On June 20, 1919, the War Trade Board announced that applications will be considered for shipments of foodstuffs to Latvia and Lithuania. It is no longer necessary for exporters to receive from their importers abroad advice that the Allied Blockade Committee in London has issued a certificate approving such shipments. Applications for export licenses should be filed with the War Trade Board, Washington, without any further formalities.

BRITISH RESTRICTIONS ON SEEDS, OILS, AND FATS

A cablegram dated June 21, 1919, has been received by the Department of State from the American Consul General at London stating that the British Food Controller had prohibited all trade in the following seeds, oils and fats, except by persons licensed by the Ministry of Food:

Copra and cocoanut oil, cottonseeds and cottonseed oil, peanuts and peanut oil, palm kernels and palm-kernel oil, linseed (flaxseed) and linseed oil, soy-bean oil, premier jus, oleo oil, and neutral lard.

The action was taken in order to limit speculative sales and purchases in view of the excessive rise in the prices of various oils and fats. The order became effective on June 23.

SINALOA STATE, MEXICO, IMPOSES PRODUCTION TAXES
(From American Consul at Mazatlan, May 26, 1919)

A production tax has been imposed by the State of Sinaloa, Mexico, upon the following commodities: Sugar, $1\frac{1}{2}$ centavos per kilo (\$0.0034 per pound); chick-peas, 50 centavos per 100 kilos (\$0.113 per cwt.)

TONNAGE PROVIDED FOR LIVESTOCK SHIPMENTS TO BELGIUM

The United States Shipping Board has authorized the Red Star Line, which is operating steamers of the Shipping Board between United States and Antwerp, to install cattle fittings on the deck of the ships and to accept shipments of cattle for Antwerp at \$100 per head. This rate includes the transportation of attendants and feed, the shippers to provide and pay for the attendants and feed. The installation of the cattle pens is to be made at the expense of the Shipping Board.

It is estimated that about 200 head of cattle can be transported on the deck of each steamer, and as the Shipping Board has several vessels sailing regularly to Antwerp, on about a 10-day schedule, a very satisfactory service is offered.

On June 12th 350 head of cattle were exported from New York to Belgium for slaughter. The cost of shipping these animals was \$129.75 per head, divided as follows:

Freight	per head	\$100.00
Feed	do	14.00
Insurance	do	8.50
Attendants	do	2.25
Miscellaneous	do	5.00
Total expense	do	\$129.75

SCOTTISH FAT LIVESTOCK RETURNS
(From Consul at Dundee, Scotland, May 20, 1919)

"The Scottish Board of Agriculture's return for the week ending May 14, shows that the total supply of fat cattle, which number 3,871, was under the average by 1,018. The best animals in some cases realized \$20.64 per cwt., with an exceptional rate of \$21.12 at Aberdeen, Castle Douglas, Dundee, Elgin, and Glasgow, as against the fixed rate of \$18.24 for first quality at this time last year and \$19.04 to \$20.40 two years ago.

"Fat sheep numbered 3,972 as compared with the normal supply of 9,834; hogs ran from \$0.34 to \$0.38 per pound, as against the graded rates of \$0.32 to \$0.35 at this time last year and \$0.39 to \$0.50 two years ago. There were on offer 234 fat pigs as compared with the average of 729. Those of the best quality realized from \$4.08 to \$4.56 per stone (\$0.29 to \$0.325 per pound). In the corresponding week of last year the range was from \$4.08 to \$4.26 (\$0.29 to \$0.304 per pound)."

SPECIAL REPORTS ON JUNE SERIES OF LONDON WOOL AUCTIONS
(From American Consul General at London, June 21-27)

At the wool auctions of June 20th 8,700 bales were sold, the best bringing from 60 to 73d. (\$1.20 to \$1.56) per pound. West Australian greasy merinos sold for 44½d. (\$0.89); New Zealand greasy crossbreds for 46 d. (\$0.92 per pound). Earlier in the day 8,500 bales low-grade foreign wool, chiefly Bagdad, were sold. The best white parcels realized 19½d. (\$0.39); blacks and browns 17½d. (\$0.35) per pound; Mongolian camel's hair brought 36 d. (\$0.72).

On June 23 the 7,600 bales offered consisted principally of Sydney, South Australian and New Zealand wools. The better classes of merinos and fine greasy crossbreds maintained full opening rates, but the lower grades of greasy crossbreds sustained a loss of 5 per cent, compared with last sales. Scoured faulty and free cape merinos sold at prices varying from 40 to 65d. (\$0.80 to \$1.30). The best scoured merino combings brought from 67½ to 74½d. (\$1.35 to \$1.49); Victorian and Adelaide greasy merinos from 46 to 50d. (\$0.92 to \$1.00).

At the auction of the 24th 9,000 bales of wool were sold. Prices remained firm without material alteration. Good grades of Sydney wools brought 74½d. (\$1.49) per pound, while greasy Victorians sold for 48d. (\$0.96).

On June 25th 7,400 bales were taken by the home trade. France and Belgium bought at prices in buyers' favor. The statement that a committee of the Wool Council had been formed to advise and administer revised scheme of standard clothing owing to present high prices, had the effect of subduing the tone, and bids were accepted more freely than previously.

On the 26th 6,650 bales were sold at current rates. France and Belgium took carbonizing wools steadily, but inferior clips had slow sales.

On the 27th 6,900 bales were offered. This lot contained a few good Sydney scoured wools which sold up to 78d. (\$1.56). The home-trade buying slackened considerably, owing to the proposed standard clothing scheme, which would take a large proportion of the mill output and for which presumably the British Government will supply wool at schedule prices.

The wool auctions are now supported chiefly by French and Belgian buyers who take merinos freely. All classes sold at prices under recent levels.

At the sale of colonial wools at Liverpool announced for July 10th, 14,000 bales will be offered.

LARGE PROPORTION OF INFERIOR WOOLS OFFERED AT
LONDON AUCTIONS DURING MAY

According to a report of the American Consul General at London to the Department of State under date of May 28, 1919, relative to the May series of the London wool auctions, the attendance of buyers was good, but competition at times dragged during the sales owing to the large

proportion of faulty and inferior wools included in the offerings. There was some buying on Belgian and French account, but American buyers did not participate. The strongest demand was shown for Australian merino and fine crossbred combings in the grease.

Spirited competition prevailed for combing greases, and high prices were paid for wools with extra long staple.

The catalogues included about 2,400 bales of Snow Whites, which was too large an offering for the trade, and in consequence all but the best descriptions were neglected and largely bought in; short faulty parcels especially are not wanted.

VENICE AS A PORT FOR UNLOADING AMERICAN COTTON (From American Consul at Venice, May 7, 1919)

"It is reported that certain local interests are considering the development of Venice as a port for the unloading, storing and shipping of American cotton to the Veneto, Lombardy, Switzerland, and Bavaria. Local shippers believe that the opening up of canal navigation between Venice and Milan will be carried out in the not distant future and that with the opening up of a cheap water route, cotton could be transported from Venice into Lombardy at a much lower cost than by rail from other ports of discharge."

IMPORTERS OF RAW COTTON IN THE NETHERLANDS

A list of the importers of raw cotton in the Netherlands has been secured for the Bureau of Markets by the Department of State from the American Consul General at Rotterdam. Copies of this list may be obtained upon application to the Bureau of Markets by asking for Report 119191.

EXTENT OF COTTON-GROWING EXPERIMENTS IN SPAIN

Statements have appeared in the Spanish press that extensive experiments in the growing of cotton in Catalonia have resulted so successfully that experts advised the planting of 321,100 acres. The Bureau of Markets requested the Department of State to obtain further information as to the status of the experiment. The results of the investigations, as reported under date of May 22, 1919, by the American Consul General at Barcelona, are as follows:

"The statements in the paragraphs cited are incorrect. In the first place, cotton is not cultivated even experimentally in Catalonia, except possibly a few plants in gardens or farms. For Catalonia is probably meant Andalusia, where about 3,000 acres are under cultivation in the district between Sevilla and Gibraltar, with a yield of about 1,000 bales during 1918. This is the acreage and result in Spain

for that year. The enterprise is private, although looked on with favor by the Government. The acreage proposed for 1919 will take up some 5,000 acres and is expected to produce about 1,700 bales. This Andalusian cotton is nearer Egyptian standard than any other, being of long staple, grown on irrigated ground, and cared for more like flower plants than anything else.

"Spain can not produce more than 40,000 bales annually under most favorable conditions and on the most suitable ground and it will take from five to seven years to reach this figure, the chief reason being that other crops pay better. At the present time, however, a tract of about 50,000 acres is being negotiated for in the Province of Malaga, which, when irrigated, will be good for cotton, but it has not yet been decided whether to devote this land to cotton or to other crops.

"More serious is the plan of private Spanish enterprise, seconded by the Government, to introduce cotton growing on a considerable scale within the Spanish zone in Morocco. If this undertaking be actually put into execution, within a generation a fair part of the demand of the Spanish spinning mills may be supplied from this source.

"As most of the cotton spinning and weaving mills of Spain are centered in Catalonia, it is natural that the chief interest in cotton cultivation should be in this part of the country where the non-arrival of foreign cotton during the war was a menace to local textile industries. While there may be speculative plans for cotton growing even in Catalonia at some distant date, it is in the South of Spain, and in Spanish Morocco where soil, climate and labor are more adaptable, that local interests look for profitable cotton crops in the more or less immediate future."

GUARANTEED PRICES OF CEREAL CROPS OF NORWAY FOR 1919
(From American Trade Commissioner at Christiania to the
Department of Commerce, May 17, 1919)

The following are the prices guaranteed by the Norwegian Government for the principal cereals produced in Norway, crop of 1919:

Crop	: Kroner per 100 kilos	: Price per bushel
Wheat	55	: \$4.02 (60 pounds)
Rye	55	: 3.75 (56 pounds)
Barley	45	: 2.63 (48 pounds)
Oats	40	: 1.56 (32 pounds)

The price of wheat given above marks an increase of 10 per cent over the price for 1918, erroneously reported in the press as also the valid price for 1919.

GRAIN AND FLOUR EXPORTS OF URUGUAY

Uruguay exported from January 1 to April 24, 1919, the following quantities of grain and flour, according to "Review of River Plate" for April 26, 1919. There are also given the exports of these commodities for 1918:

	: Wheat	: Wheat flour	: Corn	: Linseed
	: Bushels	: Barrels	: Bushels	: Bushels
From Jan. 1 to :	:	:	:	:
Apr. 24, 1919 :	207,710	53,338	----	75,862
Year 1918	898,044	307,036	5,394	240,230

SIAM RESTRICTS EXPORT OF RICE

According to a cablegram from the American Vice Consul at Bangkok, to the Department of State, dated June 14, 1919, the Siamese Government has prohibited the exportation of paddy and milled rice, except by license issued by the rice controller to registered exporters. The embargo will become effective on July 12.

According to official statistics, imports of rice from Siam for the fiscal years ending June 30, 1914 - 1918 were as follows:

Imports of Rice and Rice Products (pounds)
from Siam for Fiscal Years 1914 - 1918

Kind	: 1914	: 1915	: 1916	: 1917	: 1918
Cleaned rice	195,618	99,400	1,093,600	488,400	----
Rice flour, rice	:	:	:	:	:
meal and broken rice:	5,478,126	8,732,308	9,663,590	---	----

An article on the Siamese rice trade in 1918 appeared in Reports on Foreign Markets No. 2, page 10.

IMPORTS OF MEAT, DAIRY PRODUCTS, GRAINS, AND BEANS INTO
NEW YORK FOR WEEK ENDED JUNE 28

During the week ended June 28th 4,500 pounds of beef arrived at New York.

Two shipments of corn from Argentina intended for domestic consumption arrived at New York during the week, one on June 25 amounting to 61,930 bushels and the other on June 26 consisting of 174,251 bushels. Total for week, 236,181 bushels; total since January 1st, 2,612,831 bushels.

Twenty-six barrels of wheat flour arrived during the week from South America and 1,415 barrels from Bermuda.

On June 26th 138,230 bushels of linseed (flaxseed) and 447,979 pounds of sunflower seed arrived from Argentina.

There were imported 22,128 pounds of cheese from South America and also 2,400 pounds from other countries.

On June 23d 19,274 cases of butter passed through the port of New York in transit from Argentina to England.

A vessel which arrived from Dakar, Africa, on June 26 brought 2,035 tons of cocoa beans for domestic consumption.

Exports of Meats and Meat Products from
New York City During Week Ended June 28*

(Compiled by Bureau of Markets at New York Custom House)

Commodity	Weekly exports	Total since Jan. 1
Beef:	Pounds	Pounds
Fresh or frozen.....	7,086,490	106,516,093
Canned and pickled.....	2,619,547	71,020,622
Lamb and mutton	2,200	521,076
Pork:		
Fresh or frozen	1,298,570	31,759,415
Dry, salt, and pickled....	20,101,906	372,046,810
Bacon, hams, and shoulders:	14,922,708	374,690,981
Sausage.....	264,907	8,713,966
Poultry and game	3,800	7,351,722
Lard and lard compounds.....	20,678,490	389,736,926

*Gross weights given. Manifests pending examination 64. On June 23 approximately 4,000,000 pounds of dry, salt, and pickled pork were exported to Germany. A similar amount was shipped to the Netherlands last week. In addition 5,000,000 pounds of lard, 4,000,000 pounds of beef, and 4,000,000 pounds of bacon, included in the totals in this report, went forward recently to the Netherlands. A vessel in transit from Argentina to England cleared from New York on June 23 with a cargo consisting of 31,485 quarters of beef, 7,263 sides and 6,560 carcasses of mutton.

Exports of Hay, Grain, and Dairy Products from New York
City During Week Ended June 28

(Compiled by Bureau of Markets at New York Custom House)

HAY AND GRAINS**

	Wheat	Flour	Oats	Barley	Malt	Barley	Rye	Hay
Destination	(bu.)	(bbl.)	(bu.)	(bu.)	(bu.)	(bu.)	(bu.)	(lb.)
Belgium.....	179,221	10,671	260,004	9,333	351,120	60,345	---	---
France.....	148,827	32,855	---	---	---	---	---	---
Italy.....	44,743	72,816	---	99,550	---	---	---	---
Scandinavia :	---	---	---	31,400	51,220	29,897	---	---
United Kingdom....	150,878	86,206	---	253,348	---	17,277	198,418	---
Central America....	---	---	250	---	---	---	---	---
South America	---	10,389	---	---	527	15,766	---	---
West Indies..	---	15,648	2,832	---	---	---	---	313,410
Africa.....	167	5,276	---	---	---	---	---	---
Miscl.	---	70,938	94,627	93,334	33,514	19,928	---	---
Total.....	523,836	304,799	357,713	486,965	436,381	143,213	198,418	313,410

**Gross weights given. Manifests pending examination: Belgium 2; France 10;

Italy 3; Scandinavia 5; United Kingdom 16; Central America 2; South America 3; West Indies 4; Africa 3; Miscellaneous 15; Total 63.

DAIRY PRODUCTS*

Destination	Butter (pounds)	Cleo- margarine (pounds)	Cheese (pounds)	Condensed milk (lb.)	Ev'p'd milk (lb.)	Eggs (doz.)
Belgium	---	48,002	---	24,960	12,675	---
France	486	---	---	2,253,000	886,972	---
Italy	---	---	---	56,000	---	---
Scandinavia.....	---	---	39,774	1,298,418	---	---
United Kingdom..	---	115,755	---	3,813,636	1,645,769	30,000
Central America:	13,960	1,004	3,601	167,895	40,097	---
South America...	---	---	1,189	22,973	401	---
West Indies.....	50,150	46,121	19,388	46,387	3,125	1,080
Africa	16,045	850	4,740	299,117	18,690	---
Miscellaneous.....	550	---	1,226	55,470	---	---
Total.....	81,191	211,732	69,918	8,037,856	2,607,729	31,080
Total since :						
January 1...	15982,096	11,750,758	6,453,441	315,056,383	3,755,116	

*Gross weights given. Manifests pending examination: Belgium 2; France 10; Italy 3; Scandinavia 5; United Kingdom 15; Central America 2; South America 4; West Indies 5; Africa 3; Miscellaneous 15; Total 64. The exports of dairy products reported during the past week were comparatively light. On June 23 a vessel cleared for ports on the west coast of Africa with the totals of butter and cheese reported above. A vessel clearing from the port of New York on June 23, in transit from Argentina to England, had on board 19,274 cases of butter.

IMPORT LICENSE FOR FRUITS EXTENDED BY UNITED KINGDOM

On June 28th Mr. Edward A. Foley, American Agricultural Trade Commissioner at London, cabled that the British Food Controller has extended the general license for the importation of all kinds of fresh fruits, except grapes and pears, which are classed as luxuries, from September 1, 1919, to March 1, 1920. No license is required for colonies reacting against canned goods. The control price of apples, 67 shillings 6 pence (\$16.42) per 130-pound barrel, continues to September 1, when a new price will be set. The trade desires a general license for importation of grapes and pears, and a three-months' extension of the license for apples and oranges.

REPORTS ON FOREIGN MARKETS FOR AGRICULTURAL PRODUCTS

UNITED STATES DEPARTMENT OF AGRICULTURE
BUREAU OF MARKETS
FOREIGN MARKETING INVESTIGATIONS

WASHINGTON, D. C., JULY 10, 1919

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NOTE

IN THESE REPORTS ALL CONVERSIONS OF FOREIGN PRICES INTO U. S. MONEY HAVE BEEN MADE AT THE PAR VALUE OF THE FOREIGN MONEYS WITHOUT REGARD TO CURRENT EXCHANGE.

COST OF SHIPPING LIVESTOCK TO FOREIGN COUNTRIES

As an index of the cost of shipping cattle to foreign countries, there are given below statements of charges against recent shipments to Belgium, Uruguay and Argentina. The data was furnished by the Bureau of Animal Industry.

Livestock Shipments to Belgium

In April 180 head of grade cattle, consisting of 153 bulls, 23 steers, and 4 oxen, were shipped from New York to Antwerp for slaughter. The expense per head amounted to \$125, distributed as follows:

Transportation, including fittings	\$100.00
Insurance	8.50
Feed	13.50
Transportation and meals of foreman and attendants to care for and feed stock	3.00
Total	\$125.00

The wages of the foreman in charge of the shipment were \$200.00; wages of seven attendants, \$252.

The cost of a shipment in June of 350 head of cattle from New York to Antwerp destined for slaughter was divided as follows, per head:

Freight or transportation	\$100.00
Insurance	8.50
Feed	14.00
Attendants	2.25
Miscellaneous	5.00
Total	\$129.75

Livestock shipments to Uruguay

In June also there were shipped from New York for Montevideo, Uruguay, four Shorthorn cows and one calf. The costs per head were distributed as follows:

Transportation of cows	\$180.00
Transportation of calf	90.00
Insurance (2 per cent reduction allowed if there is no loss)	105.00
Fittings	75.00
Feed	20.25
Attendants	25.00

Later in the month eight Polled Durham cows, one bull, and four calves were shipped to Montevideo from New York. The expenses of the shipment per head were as follows:

Yardage	\$ 6.00
Transportation of cows and bull	160.00
Transportation of calves	110.00
Fittings	35.00
Insurance	120.00
Feed	50.00
Attendants	40.00

Livestock Shipments to Argentina

In May, 20 Shorthorn cows and heifers, 3 Shorthorn calves, and 3 Duroc-Jersey pigs were exported from New York to Buenos Aires. The expenses per head were divided as follows:

Transportation of cows and heifers	\$180.00
Transportation of calves	90.00
Transportation of pigs	50.00
Insurance (2 per cent reduction allowed if there is no loss)	105.00
Feed	20.25
Attendants	15.00

The rate of the United States Shipping Board for the transportation of livestock from New York to Antwerp was given in Reports on Foreign Markets No. 15, page 10.

POSSIBLE SCOTCH MARKET FOR NURSERY STOCK

According to a report from the American Consul at Dumfermline, Scotland, to the Department of State, dated May 26, 1919, "the varieties of nursery stock most likely to find a market in the Dumfermline market are those varieties of hardy young trees and plants usually planted in the northern part of the United States and Canada, peach and plum trees excepted.

"Hardy apple and pear trees, cherry and quince trees, together with gooseberry, currant bushes and few hardy plants suited for the long damp and cold winters of Scotland could be sold in limited quantities in this district."

A list of the seedsmen and nurserymen at Dumfermline and Kirkcaldy may be obtained upon application to the Bureau of Markets by asking for report 119474.

POULTRY IN ITALY AFTER THE WAR

According to the Giornale D'Italia Agricolo, Rome, Italy, May 25, 1919, the poultry industry of Italy is handicapped by breeds inferior in weight and more especially in egg production. American egg-producing breeds, although originally from Italy, far surpass the poultry of that or of any other country, because of careful breeding and feeding. For example, it is stated that American Leghorns averaged 246 eggs in a year, Anconas 300, and Sicilians 225 eggs; whereas in Italy the average production of eggs per fowl is 90 and in France 120.

For the production of fowls for the market, such foreign breeds as Buff Orpingtons, Malines Coucou, Faverolles, Dorkings, Langshans, and Houdans, of which there are some Italian breeders, are to be preferred to the ordinary Italian stock. At the present time Italian poultry raising which, as shown by an estimated annual prewar exportation of 40,750,000

dozen eggs, has been a large industry, is now of much greater importance and will be so for years to come, owing to the shortage of cattle, caused by the war and the recent epidemic of the foot-and-mouth disease. Although there appears to have been no exportation of poultry from the United States to Italy, still it would appear that American breeders of fine poultry might find a market for pedigree fowls in that country.

ITALY IMPORTS DAIRY PRODUCTS

In 1914 Italy was not only independent as regards milk and other dairy products, but also had a thriving export trade, as the following estimates in the Bollettino Dell'Agricoltura, Milan, Italy, for May 30, 1919, will indicate.

Production and Exports (pounds) of Dairy Products by Italy for 1914

Commodity :	Production :	Exports
Milk.....:	8,377,480,000 :	No data given
Butter.....:	55,115,000 :	5,952,420
Cheese.....:	396,828,000 :	70,767,660

In this trade the United States was a heavy buyer, taking 26,453,-626 pounds of cheese and 6,731 pounds of butter, according to official statistics for the fiscal year ended June 30, 1914. During the war, losses of livestock suffered in the invasions of northern Italy, the requisitions of cattle and forage by the Italian government for the use of the army, the lack of concentrated stock feeds, the shortage of labor, the necessity of preserving the calves, and recently an epidemic of foot-and-mouth disease, greatly reduced the amount of milk available for consumption, the decrease being estimated as amounting to 10 per cent of the normal in 1915, 20 per cent in 1916, 35 per cent in 1917, and for 1918 it is expected to be about 55 per cent. As a consequence the export trade has suffered greatly, as shown in the amount of cheese imported by the United States which amounted to 8,482,280 pounds in 1917 and only 16,044 pounds in 1918, as compared with more than 26,000,000 pounds in 1914, as mentioned above. Meantime, in order to supply the deficiency, milk and dairy products have been imported, and as will be seen from the table which follows, the United States furnished considerable quantities, especially of cheese and condensed milk.

Exports of Dairy Products from the United States to Italy for the Fiscal Years 1914 to 1918 inclusive (Quantity expressed in pounds)

Commodity :	1914 :	1915 :	1916 :	1917 :	1918
Butter.....:	---	---	---	2,606:	1,682
Cheese.....:	139 :	---	---	240:	571,391
Condensed :	:	:	:	:	:
milk.....:	---	68 :	490 :	390,788:	8,545,616

MARKETING CONDENSED MILK IN GREAT BRITAIN*

An article on the methods of marketing condensed and evaporated milk in England appeared in the Canadian weekly Bulletin for June 9, 1919. The following items will interest the American trade:

"The usual size of the tins are as follows: Sweetened condensed milk, full cream, 14 ounces net; evaporated milk, 16 ounces net. However, one well-known British firm put up their evaporated milk in tins of 14 ounces net but this is the only firm known to pack in this size. There is also a firm in America who pack in all sizes from a very small tin upwards for the English market.

"The controlled price to the retailer for condensed milk has been 46s. (\$11.13) per case of 48 tins and for evaporated milk 34s. (\$8.26) per case. The price to the importer has been 4s. (\$0.972) off these prices. This 4s. (\$0.972) was divided between the importers and the wholesaler, the importer receiving 1s. 3d. (\$0.405) and the wholesaler 2s. 4d. (\$0.567). The condensed milk has been retailing at about 1s. 1d. (\$0.263) per tin and evaporated from about 9½d. to 10½d. (\$0.19 to \$0.21) per tin.

Selling Conditions in Great Britain

"If the goods are sold on a c.i.f. contract the terms are net cash against documents on arrival of steamer, or seven days' sight draft, with an allowance made for pierced, blown and leaky tins in full. The allowance is based on a 10 per cent examination - that is, 10 cases in every 100 are examined, and the number of faulty tins found in them multiplied by ten is accepted as the total of which the cost value of same is to be credited to the buyer. This examination is made by the Docks Committee or a public warehouseman, who issue a certificate which is binding on both parties. However, some firms sell on the following terms: Quality and condition guaranteed for six months after arrival of goods in this country---that is to say, all bad tins are to be returned within six months and a full allowance to be made for them.

"If the brokers represent the shippers and the goods are sent direct from Canada to the buyers here, 1 per cent is the usual broker's commission. If the goods are consigned direct to the broker the terms are cash against documents, and if the work of invoicing to buyers, arranging for allowances to be made on faulty tins, claims on shipping companies for missing cases, claims on underwriters for missing tins, etc., 2 per cent is the usual broker's charge.

"Duty is chargeable on condensed milk on account of the sugar therein. The duty on condensed milk in 14-ounce tins is 11s. 3d. (\$2.83) per cwt. (112 pounds), generally 45 pounds to the case. On sweetened whole milk packed in barrels the duty is 10s. 6½d. (\$2.56) per cwt., and on milk with a small amount of sweetening the duty is 7 to 8½s. (\$1.70 to \$2.07) per cwt. There is no duty on evaporated milk."

*See note on page 1 regarding conversion of foreign money.

BRITISH POTATO-FLOUR INDUSTRY INCREASES

(From American Consul General at London, May 19, 1919)

"The production of farina on a large scale in Great Britain was begun during the war, whereas it was formerly a German industry. Its continuance as a British enterprise will depend, necessarily on a permanent increase in the potato crop. In the meantime it is reported that a large factory (one of four) at King's Lynn is handling 2,000 tons of potatoes a week, and that as soon as the remaining three factories (at Boston, Hull and Monikie in Forfarshire) are working, the output will render the country independent of the former source. Prior to the war, all farina was imported, mainly from Germany. The industry was undertaken by the Food Ministry but will be handed to the Board of Agriculture ultimately."

WAR BRINGS MALAGA OLIVE OIL TO UNITED STATES

In normal times nearly all of our imports of olive oil were from France and Italy. For the 5-year period of fiscal years ended June 30, 1910-1914, the olive oil from those countries averaged 85.3 per cent of the total imports of that commodity by the United States. The average quantity imported annually from Italy during that period was 3,293,229 gallons, while 864,796 gallons came from France.

During the war, however, the imports from these two countries decreased, and a new source, Spain, was found for our importations of olive oil. Although the prewar average imports from that country were only 292,433 gallons, or about 6 per cent of the total importation, yet statistics for the fiscal year ended June 30, 1917, show that 3,776,581 gallons were imported from Spain - 50 per cent of our entire imports of olive oil that year.

Most of the Spanish olive oil was exported from Malaga, the customs returns for the calendar year of 1917 showing that 2,126,390 gallons of edible oil, valued at \$2,674,300, were shipped to the United States.

According to a report of the American Consul at Malaga, dated May 1, 1919, the Malaga Consular District, which comprises the Provinces of Malaga, Granada, and Jaen, produces more than one-third of the total output of olive oil of Spain.

In this district alone 41,250,644 gallons of oil were produced from the 1917-18 olive crop. Of this amount the total quantity exported was 2,871,774 gallons, the greater part of which was shipped to France, Italy, Cuba, and Morocco. The action of the United States War Trade Board in prohibiting the importation of olive oil prevented a continuation of the large trade of the previous year. The 1917-18 oil crop was the largest ever produced in Spain. Notwithstanding this fact, because of the dearth of oils and fats throughout the world, prices of oil for export reached the highest levels in the history of the trade.

One of the important effects of the war on local commerce has been to bring Malaga olive oil to the attention of the world. In normal times

Malaga oil has been transported to Italy and France, where it was repacked and reexported as French or Italian oil. There are at present three olive oil refineries in Malaga with a daily capacity of about 23,500 gallons of oil. Another refinery is under construction near Bodadilla in this district and a fifth in Malaga will soon be in operation.

CAUSE OF RISE IN PRICE OF LINSEED OIL IN UNITED KINGDOM

As a possible explanation of the continued rise in the prices of linseed oil in the United Kingdom the American Consul General at London, under date of May 19, 1919, sent the following statement from a London newspaper:

"When the Government price of linseed oil prior to decontrol was reduced from the top figure of L75 to L58 (\$364.99 to \$282.26) a ton for home use, it was understood that quite an abundant supply had been rendered available through liberal seed arrivals and freer crushing. With the reestablishment of a free market on May 1 prices rose sensationally, and have continued soaring to over L87 (\$423.38) for near and L83 (\$403.92) for distant positions. This came as a surprise to consumers, but we now hear that practically all Government stocks had already been dispersed chiefly for export to destination, it is believed, in close proximity to Germany."

FERTILIZER PRICES IN NORWAY

(From American Trade Commissioner at Christiania, May 15, 1919)

"The following schedule of prices was published by the Landmusholdningselskaperne Faelleskjop, Christiania, May 1, 1919. The conversions from Kroner to dollars have been made on the par value of the Norwegian krone, \$.258:

		: Price per metric ton (2,204.6 pounds)	
Kind	Strength	Kroner	Dollars
Superphosphate	17-18 per cent	10 per cent per ton	2.68 per cent per ton
Potash	40 per cent K ₂ O	340.50	91.25
Do	20 per cent K ₂ O	197.00	52.80
Nitrates:			
Chile	13 per cent pure	232.50	62.31
Norway	13 per cent pure	240.00	64.32
Whale guano	--	200.00	53.60
Herring guano	--	220.00	58.96

"It is reported that the demands for fertilizers for spring use can all be met, except that for potash. There is a scarcity of the latter on account of the failure of the expected large shipments from Germany to arrive.

"The above prices are those which apply to the consumers. As will be noted, the Chile nitrate is quoted at a slightly lower price than the Norwegian product. The reason for this is that the Chile nitrate must be crushed before it can be applied to the land, whereas the Norway nitrate is marketed already prepared, so the two groups are practically on the same basis."

REVIEW OF THE JAVA SUGAR SITUATION IN 1918*

As Java produces more than 15 per cent of the world's supply of cane sugar, the importance of the island in the world's sugar market is readily apparent. The American Consul at Batavia has made a resume, therefore, of the Java sugar trade in 1918 and the efforts of the planters to stabilize the market when the 1917 crop could not be moved, owing to a lack of tonnage. A previous article on the sugar situation in Java appeared in Reports on Foreign Markets No. 2, page 14. Excerpts from the report of the Consul are as follows:

"A review of the sugar production and the sugar exports from Netherlands India for 1918 would not be complete without a brief survey of the conditions prevailing previous to last year, and the causes which led up to the unsatisfactory situation in 1918. Since 1914, the prices of sugar increased constantly and the Chinese, who previous to the war never dealt in sugar, started to speculate on a large scale, and in 1916 the regular sugar markets followed the Chinese and contracted for large quantities, being of the firm opinion that Europe would be forced to buy heavily in this market, and anticipated that as regards the 1917 crop, the same would happen as in previous years--that is to say, that as soon as the expected orders had been executed, a rapid rise in prices would be the result. The Chinese merchants thought themselves safe and did not appreciate the fact that guaranties and deposits would be insufficient to protect them against a possible drop in the market, which was just what happened. Contrary to all expectations, the European demand for the 1917 crop at the time of grinding, in May and July, did not materialize and, as it eventually turned out, Europe provided itself with sugar from America and other countries nearer than Java, and from the approximately 24,605 tons of 2,240 pounds of the left-over 1916 crop.

"The reduction in consumption in Europe was far greater than anticipated, and the reduction in tonnage due to the submarine menace and the greatly increased cost of transportation were such that even at a very low price it would almost be impossible to sell the remaining part of the 1917 crop. About one-third of the 1917 crop at the beginning of 1918 was still in the hands of the Java Sugar Association, and the Association was unable to dispose of the stocks before the 1918 crop came on the market. Great Britain showed no particular interest and few sales were made to British

*See note on page 1 regarding conversion of foreign money.

India, and the only strong demand came from Japan, because of the comparative failure of the Formosa crop. Even this demand was not sufficient to prevent a gradual collapse of the Java market. It was therefore impossible to prevent the 1918 crop coming on the market before the 1917 crop was all disposed of.

"In order to prevent this, the Java Sugar Association endeavored to obtain a prohibition of the export of 1918 sugar before the 1917 balance was sold. The Netherlands India Government refused to take this action, believing that such measures would hamper the trade more than it would benefit it. The prices therefore continued to go lower, and some other method was sought for to clear the market for the 1918 crop. In June, Holland began to consider the advisability of forming a new organization on an improved basis, which was to work in combination with the leading exporters. In August, an association was formed at Amsterdam called "De Vereenigde Javasuiker Producenten", or the Associated Java Sugar Producers, and toward the end of the month, the Java Sugar Exporters Association was formed in Java. The first-mentioned association consisted of all Java sugar mill owners established in Holland, as well as the producers in Java representing about 90 per cent of the total production. The local organization or Export Union was represented by all the leading producers.

"These two organizations proved very satisfactory. Although existing a short time, or until October, prices were raised from $5\frac{1}{2}$ guilders (approximately \$2.21) to 13 guilders (approximately \$5.23) a picul of 136 pounds (\$1.63 to \$3.85 per 100 pounds), first cost, basis superior. Immediately on the termination of this combination, the De Vereenigde Javasuiker Producenten considered themselves strong enough to do without the Export Union, but there was a sharp decline in prices; the situation was saved by the signing of the armistice.

"In the meantime the balance of the 1917 crop had been disposed of during the time of the agreement and besides about 10,500,000 piculs (625,000 tons) of the 1918 were sold, bringing the sales of the 1918 crop to about 19,500,000 piculs (1,160,714 tons). During the last two months of the year another 6,000,000 piculs (357,143 tons) were sold, with the result that at the end of the year about 25,500,000 (1,517,857 tons) had been disposed of and only about 2,000,000 piculs (119,048 tons) remained unsold in the hands of the Associated Java Sugar Producers. Other stocks unsold were not large.

"In contrast with the previous war years, 1917 in a lesser degree, Great Britain was not the chief buyer of Java sugar during 1918. The greatest support came from Japan who bought freely, not only for home consumption but for other countries, notably for America, on account of a large amount of tonnage available. The assistance in tonnage by the Japanese steamship companies helped materially to relieve the pressure on the warehouses at the shipping ports, and the estates were likewise relieved. During the latter part of the year the shipments were very heavy.

"At the beginning of the year large quantities of sugar of the 1917 crop remained to be shipped to British India under old sales, for which the British India and Asiatic Steam Navigation companies were unable to find the requisite tonnage. Owing to difficulties, these contracts were not completed until September and October. The total output of the 1918 crop was somewhat lower than the preceding year, 27,500,000 piculs (1,636,905 tons) as against 29,300,000 piculs (1,744,048 tons).

"There were considerable fluctuations in the sugar prices during the past year. At the beginning the prices were round about 10 guilders per picul (\$2.96 per 100 pounds) for basis Superior White. The decline for reasons already set forth reached 5 1/2 guilders (\$1.63 per cwt.), the lowest price Java white sugar has ever been sold, reaching this low level in July. At the end of August the prices steadily advanced due to the organizations of the Java sugar producers, and toward the end of the year Superior was selling at 14 guilders (\$4.14 per cwt.).

THE WOOL SITUATION IN THE UNITED KINGDOM

(From the American Consul General at London, May 14, 1919)

At the sixth meeting of the British Wool Council held on April 30 at London, the chairman referred to the London wool sales held in April, which has resulted in a regrettable disparity between the ruling market prices and the fixed Government prices. The natural result of the Government issue prices being so much lower than the prices obtained at the auctions was that it was exceedingly difficult to satisfy the large applications being made for the direct issue of wool and to find an equitable basis for distributing such quantities of wool as were immediately available.

A table had been circulated amongst the members giving particulars of the wool arrived in the present year and the amount afloat. The arrivals up to April 21 were 315,000 bales of merino, 373,000 bales of crossbred, and 104,000 bales of East Indian and other varieties. Cargoes since arrived and due were estimated to bring up the total arrivals for four months to 1,017,566 bales, but it might be safer to reckon upon actual arrivals of 950,000 bales. This quantity was fully up to the 1915 figures, which were the largest on record. In addition, there were shipments actually afloat amounting to 460,000 bales, of which 217,000 bales were merino wool, and out of the remainder, of which full particulars of quality had not yet been received, a substantial proportion would also be merino.

Shipping arrangements were working very freely, and there appeared to be every reason to expect that the total quantity of wool arriving in this country in 1919 would exceed 3,000,000 bales. This is, of course, considerably in excess of the domestic requirements of the United Kingdom.

It is exceedingly difficult to form any reliable estimate of the effective requirements of the Continent, but from financial, political,

and other difficulties these would probably be considerably below the maximum theoretical requirements. Taking the situation as a whole, it appeared that the local scarcity in certain types of wool might continue for a few weeks longer even at the ports, and perhaps in view of the difficulties of the inland transport, two or three months might pass before plentiful supplies were available at the door of the mills. It was perfectly clear, however, that the situation was substantially improving week by week, and comfortable stocks ought to be obtained at a comparatively early date.

It was stated that the Government so far from holding back any part whatever of the Government stocks of wool, was keenly interested in passing them into consumption at the earliest possible moment. As speedily as supplies came to hand and could be classified they should be placed at the disposal of the trade by auction and by direct issue with the utmost rapidity.

The demand from consumers seemed to be running entirely upon the more expensive goods, which tended to accentuate the scarcity of the finer grades of wool. A case was cited in which samples of dress material had been sent out, which in prewar days would have commanded a ready sale, and although the price quoted, 5s. (\$1.21) per yard, was very good value, no orders were obtained, though there was plenty of demand for goods at 20s. and 22s. (\$4.86 and \$5.35), which were relatively of inferior value.

JUNE-JULY SERIES OF LONDON WOOL AUCTIONS*

Special reports on the London auctions of Colonial wools have been received daily by the Bureau of Markets through the Department of State, from the American Consul General at London. At the auction on June 30th, 10,300 bales of wool were sold. Good Sydney scoured wools brought 77d. (\$1.54) per pound. South Australian greasy merinos realized 49d. (\$0.98); crossbreds 46½d. (\$0.93); and New Zealand slipes 50d. (\$1.00) per pound. Coarse and faulty wools were distinctly easier.

On July 1st, 9,600 bales were sold. New South Wales good scoured wools brought 79d. (\$1.58). The best greasies sold for 51d. (\$1.02); Melbourne greasy merinos 59½d. (\$1.19). One thousand five hundred bales of free Cape wools sold as follows: scoured 49d. (\$0.98); Kaffrariat grease, 38d. (\$0.76) per pound.

At the wool auction of July 2, Sydney scoured greasy merinos sold for 86d. (\$1.72) per pound, while greasy crossbreds brought 47d. (\$0.94). Victorian greasy merino pieces realized 54d. (\$1.08) and half greasy broken fleeces sold for 57d. (\$1.14). Adelaide greasy crossbred lambs brought 12½ to 28½d. (\$0.25 to \$0.57) per pound. One thousand five hundred bales of South African free wools were purchased for the Continent at 41d. (\$0.82) for greasy super combings and 60d. (\$1.20) for Snow Whites. The total offerings were as follows: New South Wales 5,248; Victorian, 1,173; South Australian 685, and New Zealand 2,776 bales.

*See note on page 1 regarding conversion of foreign money.

Of the 10,100 bales of wool auctioned on July 3, a good proportion were bought for French consumption. The prices ranged up to 53½d. (\$1.07) per pound for the best greasies.

The next series begins on July 14, when the offerings will amount to 130,000 bales.

On July 4, the closing day of the June-July series, 8,500 bales were sold. During the series an active demand has resulted in the firm maintenance of May prices for the finer grades of merinos and crossbreds, while inferior and faulty merinos ruled from 5 to 10 per cent easier towards end of the first week of the sale. French buying tended to increase the prices of the better classes of merinos and crossbreds 5 per cent. The small supply of South African wools offered showed a rise of 5 per cent for greasy and from 5 to 10 per cent for scoured wools. The sales closed with a firm undertone and prices equal to the best.

PRICE OF MEXICAN GARLIC

According to the American Consul at Ciudad Juarez, Mexico, to the Department of State, under date of June 12, 1919, garlic is being harvested in Chihuahua. Large quantities of garlic are exported to firms in El Paso, Texas, who reship it to interior points of the United States, where it finds a ready sale.

In the interior of the State of Chihuahua garlic may be bought for \$0.06 to 0.075 per pound. The export duty is \$0.0025 for fresh garlic and \$0.005 for the dried article. The Consul stated that considerable profit has been made in garlic by American firms within the last few months.

RETAIL PRICES OF FOODSTUFFS IN MEXICO DURING APRIL*

(From American Consul at Ciudad Juarez, May 23, 1919).

Prices per pound			Prices per pound		
Commodity	Ciudad Juarez	Casas Grandes	Commodity	Ciudad Juarez	Casas Grandes
Corn.....	\$0.025	\$0.0272	Sugar..	\$0.114	\$0.228
Beans.....	.0365	.091	Flour..	.078	.091
Rice.....	.144	.159	Meat..	.17	---
Coffee ...	.17	.296	Lard...	.45	.45

*See note on page 1 regarding conversion of foreign money.

NETHERLANDS FOOD NOTES

According to the "Nieuwe Courant" (Amsterdam), the Government of the Union of South Africa has sanctioned the export of 284,943 bushels of corn to the Netherlands. The corn crop of Java will be purchased by the Netherlands Government and will be sold at fixed prices.

The Inter-allied Committee at The Hague has fixed the import ration for molasses and treacle, not including fodder molasses, at 26,455,200 pounds for the year which began on October 1, 1918.

The unrestricted importation of dried fruits is now permitted. The Inter-allied Committee has placed nuts and kernels, excepting peanuts, in the same category as dried fruits and will allow a sufficient supply to be imported to meet the needs of domestic consumption.

Before the war the United States carried on a large trade with the Netherlands in dried fruits as the following table will show:

Exports of Dried Fruits and Nuts (in Pounds) to the
Netherlands for the Fiscal Years Ended June 30, 1913 - 1918

Commodity	1913	1914	1915	1916	1917
Dried apples...	12,846,054	9,147,104	5,200,178	1,878,251	187,286
Dried apricots:	3,625,314	2,064,471	1,285,632	2,526,953	345,031
Dried peaches..	213,491	336,453	635,289	480,395	141,850
Prunes	16,589,300	6,387,056	579,512	2,467,052	330,580
Raisins and	:	:	:	:	:
other dried :	:	:	:	:	:
grapes.....	127,351	----	47,000	36,060	11,000
Nuts, except :	:	:	:	:	:
peanuts	91,015	63,795	65,205	122,387	43,338

The imports of offal (casings, middles, and rounds) into the Netherlands for the year 1919 has been fixed at 661,380 pounds.

RISE IN PRICES OF FOODSTUFFS IN CONSTANTINOPLE*

The following comparison of the prices of various foodstuffs in Constantinople before the war and at the end of February, 1919, has been compiled from "The Near East" (London) for May 9, 1919:

Commodity	Average prices		Percentage increase
	Prewar	Feb. 1919	
Bread -- pound	\$0.0194	\$0.776	3,900
Meat -- do	.124	2.49	1,900
Sugar -- do	.0388	3.10	7,900
Eggs -- do	.264	3.168	1,100

*See note on page 1 regarding conversion of foreign money.

MOVEMENT OF GRAIN TO SEABOARD FOR EXPORT

North Atlantic ports		South Atlantic and Gulf ports	
: Quantity (bushels),	:	: Quantity (bushels),	:
: week ended--	:	: Port	: week ended--
: June 18 : June 25	:	: June 25 : June 14	:
Received in	:	New Orleans..	3,174,811 : 2,847,085
elevator.....	5,948,174 : 5,701,194	Port Arthur..	Empty : Empty
Clearances....	6,051,654 : 5,532,421	Texas City..	do : do
Total in ele-	:	Galveston...	1,384,092 : 1,840,794
vator at end	:	Total	4,558,903 : 4,687,879
of week	10,537,193 : 9,867,640	:	:

As indicating the export shipping situation, there is given below the total number of carloads of export freight on hand at the seaboard awaiting clearance, exclusive of bulk grain and coal:

Ports	Quantity (carloads) for week ended--	
	June 25	June 18
At North Atlantic ports	23,526	24,604
At South Atlantic and Gulf ports....	10,228	10,894
At Pacific coast ports	3,165	3,400
Total	36,919	38,898

REPORTED CENTRALIZATION OF PURCHASE OF FOODSTUFFS BY GERMANY

According to a report from the American Consul General at Stockholm, Sweden, to the Department of State, under date of May 7, 1919, "An American commercial traveler representing one of America's largest cereal manufacturers states that there is a project now under way whereby the purchase from the Northern Neutrals of foodstuffs and other commodities for Germany, is to be made by one central organization acting in the interests of the German buyers. Whether this is with a view to defeating the low rate of German exchange or whether it is intended to eliminate competition amongst German buyers and obtain lower prices for goods imported is not yet clear."

IMPORTS OF GRAIN AND DAIRY PRODUCTS INTO NEW YORK
DURING WEEK ENDED JULY 5

Shipments of corn arrived from Argentina during the week ended July 5 as follows: June 30th 144,594 bushels; July 3d 125,350 bushels. Total during week 269,944 bushels; total since January 1st 2,882,775 bushels.

On July 1st 2,000 pounds of cheese arrived at New York from Hongkong.

Exports of Meats and Meat Products from
New York City During Week Ended July 5*

(Compiled by Bureau of Markets at New York Custom House)

Commodity	Weekly exports:	Total since Jan. 1
Beef:	Pounds	Pounds
Fresh or frozen	427,002	106,543,095
Canned and pickled	2,014,023	73,034,650
Lamb and mutton	730	521,806
Pork:		
Fresh or frozen	404,491	32,163,906
Dry, salt, and pickled	5,543,139	377,583,949
Bacon, hams, and shoulders..	11,514,226	386,205,207
Sausage	245,880	8,959,846
Poultry and game	476,085	7,827,807
Lard and lard compounds.....	8,889,231	398,626,157

*Gross weights given. Manifests pending examination 60. Approximately 1,750,000 pounds of pickled or canned beef were exported on June 30, to Danzig. On July 3 over 4,100,000 pounds of dry, salt, and pickled pork, and also 3,450,000 pounds of lard, were shipped to Germany.

Exports of Hay, Grain, and Dairy Products from New York
City During Week Ended July 5

(Compiled by Bureau of Markets at New York Custom House)

HAY AND GRAINS**

	Wheat	Flour	Oats	Barley	Malt	Barley:	Rye	Hay
Destination	(bu.)	(bbl.)	(bu.)	(bu.)	(bu.)	(bu.)	(bu.)	(lb.)
Belgium	---	15	128,273	---	5,692	---	---	---
France	---	---	222,760	---	---	---	---	---
Holland	---	---	169,725	---	---	15,585	40,000	---
Italy	209,437	19,523	---	---	7,890	---	---	---
Scandinavia...	---	---	---	87,585	78,892	---	---	---
United Kingdom....	---	28,372	---	167,371	---	20,000	448,841	---
Near East.....	---	---	---	---	10,294	---	---	---
South America:	---	5,720	300	---	20,943	3,181	---	---
West Indies...	---	7,750	919	---	---	---	---	327,445
Africa.....	---	3,542	---	---	---	---	---	---
Miscellaneous.....	---	1,050	---	---	---	---	---	---
Total.....	209,437	65,972	521,977	254,956	123,711	33,766	488,841	327,445

**Gross weights given. Manifests pending examination: Belgium 2; France 4; Italy 4; Scandinavia 3; United Kingdom 10; South America 2; West Indies 8; Africa 4; Miscellaneous 12; Total 49.

DAIRY PRODUCTS*

Destination	Butter (pounds)	Oleo- margarine (pounds)	Cheese (pounds)	Condensed: milk (lb.)	Ev'p'd milk (lb.)	Eggs (doz.)
Belgium	---	5,345:	85,056:	116,000 :	---	---
France	---	---	310:	2,552,566 :	1,229,572:	---
Italy	---	4,480:	---	---	---	---
Scandinavia.....	34,748:	---	55,235:	---	---	---
United Kingdom :	---	---	---	1,013,160 :	724,870:	---
Near East	---	---	---	21,420 :	---	---
Central America:	915:	1,900:	1,340:	18,387 :	53,000:	---
South America...	18,046:	---	2,716:	67,607 :	1,580:	---
West Indies.....	43,185:	36,892:	56,045:	608,465 :	30,534:	---
Africa.....	4,650:	---	1,440:	1,020 :	50,576:	---
Miscel.....	---	---	---	2,172,405 :	591,615:	---
Total.....	101,544:	48,617:	202,142:	6,571,530 :	2,681,747:	---
Total since :	:	:	:	:	:	:
January 1...:	16,083,640:	11,799,375:	6,655,583:	324,309,660 :	3,755,116:	---

*Gross weights given. Manifests pending examination: Belgium 2; France 5; Italy 4; Scandinavia 3; United Kingdom 15; Central America 1; South America 2; West Indies 8; Africa 4; Miscellaneous 16; Total 60. The shipment of butter listed above for Scandinavia was shipped on July 3, to Norway, while on June 30th 85,056 pounds of cheese were exported to Belgium. The shipments of condensed milk included under "miscellaneous", amounting to 1,623,768 and 519,138 pounds, and of evaporated milk totaling 273,020 and 313,260 pounds, were exported to the Dutch East Indies and the Straits Settlements, respectively.

JUL 23 1919

NO. 17

EXPERIMENT STATION FILE

REPORTS ON FOREIGN MARKETS FOR AGRICULTURAL PRODUCTS

UNITED STATES DEPARTMENT OF AGRICULTURE
BUREAU OF MARKETS
FOREIGN MARKETING INVESTIGATIONS

WASHINGTON, D. C., JULY 17, 1919

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NOTE

IN THESE REPORTS ALL CONVERSIONS OF FOREIGN PRICES INTO U. S. MONEY HAVE BEEN MADE AT THE PAR VALUE OF THE FOREIGN MONEYS WITHOUT REGARD TO CURRENT EXCHANGE.

FOOD CONDITIONS IN ENGLAND

As an indication of the shortage of foodstuffs in England, the following excerpts have been taken from a recent report to the Bureau of Markets from Mr. Edward A. Foley, Agricultural Trade Commissioner at London:

"I find food much scarcer in England than I had anticipated. Butter and eggs are so scarce as to be practically off the market. Although the sugar rationing cards have been recalled, the supply is inadequate. At my hotel one lump of sugar a meal is allowed. A small piece of margarine, which must last for the day, is served at breakfast. Fish is very much in evidence at all meals, and the portions are large. On the other hand, meat portions are very small.

"An attempt was made to relieve the meat shortage by the importation of beef from Siberia, but the quality was so unsatisfactory that the plan was abandoned.

"Clothing has advanced more than a hundred per cent above prewar prices, with a shortage of materials of the better classes. An impending general strike of tailors will send prices still higher, it is said.

"Prices of many commodities are above those in the United States. Living expenses are about double.

"Under the caption 'High prices follow decontrol' the Daily Mirror, under date of June 6, published the following quotations:

In Smithfield Market yesterday really good calves fetched 2s.6d. (\$0.61) per pound, and for best cuts, retail, as much as 3s.6d. (\$0.90) per pound was obtained. In spite of the high prices the demand was far greater than the supply. Yesterday in Newcastle veal and lard went up 6d. (\$0.12) per pound and margarine 2d. (\$0.04) per pound.

"That there will be a shortage of fruits is indicated by the following excerpts from the London press of June 6:

An Evening Standard representative who saw fruit buyers and jam manufacturers to-day elicited the general verdict: Neither cheap nor plentiful. There is absolutely no likelihood of big strawberry crops. As a matter of fact, there is less acreage under strawberry cultivation. One buyer said:

'I have recently been in such centres as Knockholt, Kent. There the injunctions of the Minister of Agriculture with regard to the need for increased wheat production have caused hundreds of acres previously given up to strawberries and other fruits to be cut up.

'As regards plums, rain may save the situation, but the drought conditions have played havoc with plums, cherries, and apples. It is just possible that rain and transport at the wrong time in August may bring a rush of Victorias, Monarchs, and Bush plums on to the market. Growers are asking big prices.'

At one of the jam manufactories in the country the managing director said: 'It is a fact that some jam makers have been buying somewhat heavily at high prices. Growers' prices this year are almost impossible for discreet jam makers.'

Currants, strawberries, raspberries and gooseberries will be comparatively short.

'The rain has come too late', said a leading buyer to The Daily Mirror yesterday. 'A large grower told me that during the last 10 days he lost three-fifths of his plums and cherries and about one-half of his prospective apple crop.'

A comparison of last year's controlled prices with those now asked by growers is interesting:

	<u>This Year</u>	<u>Last Year</u>
Strawverries.....cwt...50s.to 84s.(\$12.15-20.41)	40s.to 44s.(\$9.72-10.69)	
Gooseberries.....cwt...35s.to 40s.(\$ 8.50- 9.72)	27s. (\$ 6.56)	
Currants, black...cwt... 70s. (\$17.01)	50s. (14.58)	
Currants, red.....cwt...Not quoted	32s. (7.72)	
Raspberries.....cwt...60s.to 70s.(\$14.58-17.01)	44s. (10.69)	

There is no doubt that the controlled prices for jam do not justify the high prices paid for fruit, but those who are caught cannot blame anyone but themselves, for we have had a straight tip from the Food Ministry that jam prices may be controlled at a lower level."

According to the London Times for June 16, the fruit crop in County Armagh, Ireland, promises to be the largest since the war began. Gooseberries, plums, and damsons are safe for a big crop. Growers are fighting the grub on the apple trees to save heavily set boughs, and the rain is swelling out the strawberries. The fruit-growing district in County Armagh is the largest in Ireland."

FOREIGN TRADE OF THE UNITED KINGDOM, 1913 AND 1913

(From the American Consul General at London, May 8, 1919)

"Compared with the total foreign trade in 1913, the last complete prewar year, there was an increase in 1918 of \$2,166,527,198 (or nearly 32 per cent) to \$8,996,927,920. Imports rose by \$2,679,413,646 in 1913 to \$6,420,461,253 in 1918; exports declined by \$130,287,027 to \$2,425,819,171, and reexports by \$382,599,421 to \$150,647,496, the percentage of increase in imports being approximately 140 per cent, while the fall in exports and reexports was 5 per cent and 71 per cent respectively.

"Contrasted with the returns for 1917, imports last year rose by \$1,241,903,848, exports by \$11,433,083, while reexports dropped by

\$187,437,868, the figures for 1917 showing total imports valued at \$5,178,-757,405, exports \$2,565,033,584, and reexports \$339,035,364.

"For the year 1918, in imports of food, drink and tobacco, meat rose by \$340,000,000, nondutiable food by \$160,000,000, dutiable food by \$99,000,000, and tobacco by \$70,000,000, but grain and flour decreased by \$99,000,000. In raw materials an increase of \$360,413,910 occurred, of which oilseeds, nuts, oils, fats, and gums rose by \$195,000,000 and raw cotton by \$190,000,000. Small increases occurred in wood and timber, and hides and undressed skins. On the other hand, imports of raw wool fell by \$60,000,000, while under the heading of "miscellaneous materials" a decrease of \$40,000,000 appeared.

"In exports there were decreases in grain and flour, meat and other food and drink, tobacco alone showing a slight rise. The total fall exceeded \$19,000,000. Of raw materials the value declined by over \$30,000,000 to \$296,069,027, the chief decreases being due to smaller exports of oilseeds, fats, and gums, which dropped \$25,000,000, and wool which fell \$7,000,000."

MALAGA, SPAIN, AS AN EXPORT FIELD

(From Annual Report, 1918, of American Consul at Malaga, May 1, 1919)

"The Malaga Consular District comprises the Provinces of Malaga, Granada, and Jaen, with a total area of 12,852 square miles, which is slightly larger than the State of Maryland, and a population of 1,572,725 almost equally divided in the three provinces. The city of Malaga, with a population of 142,000, owes its commercial rank to its importance as an export point for olive oil, almonds, wines, raisins, figs, oranges, lemons, essential oils, and mineral products, especially lead.

"There are few large importing houses in this Consular district. Malaga is not large enough for much business through importing agents who might buy for their own account articles for which they would require exclusive agency rights. As local trade is almost exclusively retail, some American exporters have overcome the difficulty of making direct sales by securing a general agent for the country with headquarters in Madrid or Barcelona; the reason why this commercial system of distribution is considered more satisfactory by local dealers than direct importing on a small scale for their own account is that tedious correspondence and long delays are avoided through the placing of their orders with traveling salesmen who bring samples, quote prices f.o.b. Malaga in pesetas, and are authorized to extend credit. In most cases it is not advantageous for American exporters to attempt to secure agents to represent them here."

CHANGES IN BRITISH EXPORT EMBARGOES

According to a cablegram from the American Consul General at London to the Department of State, under date of July 9, 1919, the following articles which have heretofore been prohibited from being exported from the United Kingdom, have now been removed from the embargo list and may be exported to all destinations: Wet, salted cattle hides; leather, except chamois, skivers, and seal; fresh vegetables of all kinds. Potash salts and mixtures thereof not otherwise prohibited, previously prohibited to all non-British destinations, have also been removed. The following articles have been placed on the embargo list: British and Irish cattle, hides, and fresh tomatoes.

RESTRICTIONS ON IMPORTS OF AGRICULTURAL PRODUCTS REMOVED BY FRANCE

According to a cablegram from the American Consul General at Paris to the Department of State, under date of June 28, 1919, the embargo against the importation into France of agricultural products, except refrigerated meats and combed or carded wools, has been removed.

A decree of June 14, published on June 18, establishes the schedule of ad valorem surtaxes to be collected in addition to former duties. The surtax ranges from 10 to 40 per cent in the general tariff and 5 to 20 per cent in the minimum tariff. The value of merchandise to be declared is its value at the place and moment of presentation to customs, but not including duty charges.

MARKET SOUGHT IN UNITED STATES FOR ALOES

A business man in Curacao, Dutch West Indies, desires to sell 1,000 cases of aloes (case weighs 125 pounds, more or less). Ask for Report 120088.

ANTWERP MUSEUM DESIRES PAMPHLETS ON LINEN INDUSTRY

The Commercial and Industrial Museum of the City of Antwerp has requested the American Consul to obtain American trade journals of the linen industry having special reference to the growing and preparation of the fiber. The Consul suggests that catalogs, pamphlets, and trade journals of the linen industry be sent to the American Consulate at Antwerp.

IMPORTATION OF COTTON INTO GREECE RESTRICTED

The War Trade Board announced that the Greek Government has prohibited, effective May 26, 1919, the importation into Greece of seed or ginned cotton; cotton yarns, soft or tight rolled up to size No. 34; colored and English cotton prints, drills and "aladza" (gingham) of Class One 59 B of Greek Customs Regulations. Special import licenses may be issued at the discretion of the Minister of National Economy for goods purchased and shipped prior to May 3, 1919.

IMPORTER OF RAW COTTON IN INDO-CHINA

Principal importer of raw cotton in Indo-China. If interested, ask for report 120374.

CULTIVATION AND MARKETING OF COTTON IN HAITI

(From American Consul at Port-au-Prince, Haiti).

"Cotton has a riotous growth in all parts of the island, but little attention is given to its cultivation. Every one or two years the bushes or young trees are cut down level with the ground, numerous young shoots spring up from the roots, and with the exception of weeding two or three times a year this is all the cultivation that it receives. Owing to the difficulty of obtaining laborers for picking when the season for gathering arrives it is often put upon the market in a very badly prepared state; mixed with dead leaves and small twigs. Once planted, it grows and continues producing for 15 or 20 years.

"The article is considered to be of a fair grade; formerly the greater part was shipped to Europe, principally to France. Since the beginning of the war in Europe, a large part of the crop has been sold in the United States, and the sales are increasing in that market.

"Lately there has been considerable interest taken with a view to increasing the output, and at the present time a company is being organized with sufficient capital for the purpose of encouraging the cultivation on a large scale. It should be produced for about one-third less than in the Southern States. It is contemplated planting the Sea Island cotton, but it is doubtful whether it will be successful with this cultivation, as it only produces one crop and must be replanted every year. Any cultivation that requires much attention and labor will not succeed in Haiti at the present time".

"There has been no lack of shipping to the United States and Japan during the month.

"The following prices ruled at the end of the month:

	Price per : pound. :		Price per pound.
Superior snow-white	\$0.80 - .96	: Grease, karoo, 12 months,	\$0.28 - .30
Medium snow-white ...	.72 - .76	: average	
Faulty snow-white ...	.50 - .60	: Grease, karoo, medium to	
Grease, grassveld, 12		: long .....	.24 - .25
months, special		: Grease, karoo, heavy and	
clips .....	.40 - .46	: earthy .....	.20 - .21
Grease, grassveld, 12		: Grease, grassveld, short	
months, super clips	.36 - .40	: light free .....	.24 - .30
Grease, grassveld,		: Grease, karoo, short light	
average long .....	.24 - .30	: free .....	.24 - .28
Grease, karoo, 12		: Grease, short, heavy ....	.16 - .18
months, special		: Grease, short, seedy ....	.14 - .18
clips .....	.32 - .36	: Grease, crossbred, white-	.20 - .28
		: Grease, coarse and colored	.14 - .21

Hides and Skins

"The market for skins and hides continued firm throughout the month without change of prices. Capeskins and goatskins were in special demand.

"The following prices ruled at the end of the month:

	Price per : pound. :		Price per pound.
Sheepskins	\$0.26 - .27	: Angora skins, up to 5 lbs.	\$0.20 - .22
Sheepskins, damaged,	.22 - .23	: weight	
Pelts .....	.16 - .20	: Angora skins, 5 lbs. and over,	
Pelts, damaged, ....	.06 - .08	: and sundried .....	.18 - .20
Goatskins, under 3½ lbs.		: Angora skins, shorn, ....	.16 - .18
weight .....	.46 - .48	: Angora skins, damaged, ....	.12 - .14
Goatskins, 3½ lbs. and		: Cape skins .....	.85 - 1.52
over .....	.36 - .38	: Coarse-woolled .....	.24 - .25
Goatskins, sundried,	.40 - .44	: Hides, sundried .....	.30 - .31
Goatskins, damaged, .	.24 - .26	: Hides, damaged .....	.26 - .27
		: Hides, dry salted .....	.30 - .31

MARKET FOR HORSEMEAT IN DENMARK, FINLAND, AND GERMANY

The Commercial Attache at Copenhagen, Denmark, in a cablegram to the Department of Commerce, under date of July 8, reported that American horsemeat would be salable in Denmark, provided the price was low enough. There are also possible markets in Finland and Germany. Meat for these countries should be handled through Copenhagen.

FIBER FROM WASTE FLAX STRAW

According to "La Argentina", successful experiments have been concluded recently in Argentina on the utilization of the fiber of flax straw, which heretofore has been burned as waste. It is stated that the fiber obtained from the straw of Ussitatissimum flax are producing a fiber equal to that of Riga flax. More than 1,200 acres are under cultivation. It is estimated that each acre produces about 2,700 pounds of straw, from which 540 pounds of fiber can be obtained.

ITALIAN FIRM HAS CORN-STRAW TIPS AND BROOM CORN FOR EXPORT

A firm in Florence, Italy, has corn-straw tips for the manufacture of brushes and bleached broom corn ready for export. If interested, ask for report "ab."

RAW MATERIALS NEEDED BY POLAND

According to the Foreign Trade Supplement of the London Times for May 31, 1919, the following are Poland's estimated annual requirements of agricultural products:

Cotton, 1 inch, more or less.....	bales	154,560
Cotton, under 1 inch, and linters.	bales	186,816
Cotton cuttings	bales	113,792
Jute	tons	28,300
Wool	tons	27,000
Wool cuttings	tons	6,700
Vegetable oils	tons	15,000
Animal greases (beef and whale)...	tons	6,000

PRICES OF WOOL AND HIDES IN SOUTH AFRICA

The American Consul at Port Elizabeth, South Africa, forwarded to the Department of State, under date of April 10, 1919, a report on the wool and hide situation at Port Elizabeth. The following excerpts are from the report:

The Wool Situation

"Early in the month of March the limited demand was for average combing wools, but later the principal demand was for super-combing lots and scouring wools. Only a small percentage of the offerings were sold, but prices remained at former levels for the lots sold.

"At the end of the month American buyers began operating again in super-light combings and new season's lambs on a small scale.

IMPORTED BULLS FOR SALE IN ARGENTINA

According to the "Review of the River Plate" for May 16, 1919, about 500 imported pedigree bulls will be offered for sale in Argentina during the season. Pedigree livestock are arriving by most of the steamers. Most of the shipments are from the United Kingdom, but some have been received from the United States.

EXPORT OF SWEDISH AYRSHIRE CATTLE

According to a report from the American Consul General at Stockholm, Sweden, to the Department of State, under date of April 23, 1919, the Swedish Ayrshire Association is planning to export Ayrshire cattle as soon as such export is permitted. Offers have been received from Finland, the Baltic provinces, Russia, Poland, and Germany. Application has been made for export licenses for 25 Ayrshire bulls for shipment to Finland.

EXPORTS OF PIG INTESTINES FROM HANKOW, CHINA

Pig intestines are exported in considerable quantities to Europe and America from Hankow, Tientsin, and Shanghai. Those from Hankow are usually packed in bundles of 14 meters (45.92 feet) in length in strong cases containing 2,200 or 2,500 bundles each. The pig intestines are said to average 13½ meters (44.28 feet). Pig intestines were exported from Hankow during the last five years as follows:-

Year	(Quantity (pounds))	Value (U.S. Gold)
1914	294,153	\$69,622
1915	125,200	24,826
1916	105,467	32,214
1917	139,733	52,503
1918	123,733	56,294

DEVELOPMENT OF MARGARINE INDUSTRY IN THE UNITED KINGDOM

During the years 1913 to 1915 the imports of margarine (not including oleomargarine) by the United Kingdom were nearly equal to the domestic production. In 1916 the United Kingdom imported 6 per cent more margarine than it produced. Since that time, however, the production has been increasing and the importation decreasing. In 1918 the production amounted to 285,000 tons and the imports were only 15,130 tons, or 5 per cent of the total supply. The following article from "The Economist" (London) indicates that an export trade in this commodity is expected from the newly developed industry:

"Very remarkable progress has been made by the margarine industry of the United Kingdom, the production now being three times what it was before the war, and the country rendered entirely independent of foreign imports. Hitherto the supply was furnished partly by home production and partly by imports from Holland principally.

"Since the beginning of the war great efforts were made to increase production, which was greatly favored by the plentiful supplies of oil, nuts, etc. grown within the British Empire and formerly absorbed by Germany. The following table shows home production and imports for the past few years:

"Production and Imports (Tons of 2,240 Pounds) of
Margarine (not Including Oleomargarine) of the United Kingdom

Year	:	Production	:	Net imports
1913	.....	83,775	:	75,506
1914	.....	89,860	:	76,023
1915	.....	110,700	:	102,457
1916	.....	128,900	:	137,172
1917	.....	185,330	:	90,390
1918	.....	285,000	:	15,110

"The imports last year were confined to the first three months, since when there have been no imports at all. If compound lard, which is being manufactured for cooking purposes were included in last year's production, the total output would be considerably over 300,000 tons. A very satisfactory feature is the great improvement in quality, and the economy of production, which warrant the belief that the British margarine industry is now in a sufficiently strong position to hold its own against all comers in the home market, and to make a bid for export trade, which seems likely to develop when restrictions on overseas trade are removed."

CAUSES OF REDUCTION IN DUTY ON TOBACCO BY MEXICO

Reference was made in Reports on Foreign Markets No. 12, page 10, to the reduction in the export duty of leaf tobacco by Mexico. The American Consul General at Mexico City in a report to the Department of State, dated June 10, 1919, assigned the following reason as the cause of the decrease:

"The reduction of the export duties on tobacco was made in view of the fact that there actually exists a large demand for Mexican tobacco in foreign countries. Previously tobacco was not exported from this country in large quantities owing to the high rate of export duties levied on that article. As the production of tobacco in Mexico by far exceeds its consumption, the producers will be in a position to export large quantities which have no market in this country."

Exports of Foreign Beans and Rice* from the
United States during May, 1919

Exported to --	: Beans	:	:	:	Beans	:
	: and	: Cleaned	:	:	and	: Cleaned
	: lentils	: rice	:	:	lentils	: rice
	: Bushels	: Pounds	:	:	Bushels	: Pounds
Austria-Hungary	4,100	: ----	:	Cuba	10,593	: 11,981,351
Belgium	3,000	: ----	:	Danish West Indies:	----	: 2,600
France	116,978	: 2,954	:	French West Indies:	----	: 15,000
Gibraltar	18,857	: 186,838	:	Haiti	----	: 431,995
Greece	917	: 20,000	:	Dominican Republic:	23	: 1,019,782
Italy	2,180	: ----	:	Brazil	1,083	: 20,000
England	71,472	: 182,295	:	Colombia	----	: 979,190
British Honduras	----	: 19,200	:	French Guiana	----	: 11,200
Guatemala	4	: 3,047	:	Peru	----	: 25,000
Honduras	----	: 3,000	:	Uruguay	----	: 175,000
Nicaragua	1	: 14,796	:	Venezuela	25	: 223,450
Salvador	----	: 48,500	:	All others	1,060	: 3,660
Mexico	48	: 96,217	:			
British West Indies	----	: 23,787	:	Total	230,341	: 15,488,862

*Exports of uncleaned rice: British Oceania 18,000 pounds. Exports of rice flour, meal, and broken rice (pounds): Nicaragua 20 and Cuba 93.

RICE SITUATION IN SOUTHEASTERN ASIA

Articles in previous numbers of these Reports (No. 2, page 12; No. 8, page 2; No. 15, page 14) have indicated that oriental rice was not available for export in as large quantities as in previous years. Droughts which caused a decrease in the grain yield of the Orient have caused various restrictions to be placed on the export trade. The export of rice from Burma has been prohibited; and this restriction, together with the restriction on rice exports by Siam, has affected the markets of the East, which are dependent upon Burma for half of its rice imports. In Burma, Indo-China, and Siam there has been heavy buying of the new rice crop by the various governments, in order to relieve the serious shortage of grains and the consequent approach to famine conditions. The sudden cutting off of these supplies caused the prices to soar, resulting in Japan in rice riots.

The effect of these abnormal conditions on the Hongkong market and that of the United States is indicated in the following report of the American Consul at Hongkong to the Department of State, under date of May 19, 1919. As shown in the article entitled "The Foreign Trade in Rice" (Reports on Foreign Markets No. 8, page 4), the exports of rice from Hongkong to the United States in 1918 amounted to 116,138,064 pounds, or more than 25 per cent of our total imports of that commodity last year.

"The rice situation in southeastern Asia is again becoming acute and serious, and unless there is an end to exports there will be serious difficulty in securing enough supplies to meet the needs of the population of South China itself. Supplies of rice coming into the Hongkong market are becoming more and more meager compared with other years. Imports from Saigon are scarcely more than nominal at the present time, while the export of grain from Burma has been prohibited. Supplies from Siam are smaller than usual as a result of the demand for the grain elsewhere. All over the East, and particularly in the Straits Settlements, Java, and Sumatra, as well as in India, there is an increasing shortage of supplies.

"On the other hand, exports from this port to the United States have continued, the exports so far the present year having amounted to a total of 17,301 short tons, valued at \$2,093,789, and to the Philippines, 4,890 metric tons valued at \$570,680. The demand from the United States both for consumption and especially for reexport, continues very strong. The recent heavy rise in exchange, however, has offset this demand, for under present conditions the cost of Hongkong rice in the United States is all but prohibitive. There is every indication that the situation in South China will grow much more serious before it is materially relieved.

"Another feature of the situation likely to be of importance in the United States is the fact that the quality of the rice coming into this market is far below the usual standard. It is impossible under present conditions that the new arrangement entered into between the San Francisco Rice Association through the San Francisco Chamber of Commerce and the Hongkong Exporters' Association through the Hongkong General Chamber of Commerce be carried out the current season since it is not now possible to guarantee the percentage of broken grain.* It will probably be some time before the trade as a whole can be restored to normal conditions."

*The new Hongkong rice standards were published in Reports on Foreign Markets No. 10, page 5.

MARKET IN VENEZUELA FOR AMERICAN FRESH FRUITS

The American Consul at La Guira, Venezuela, transmitted a special report for the Bureau of Markets, under date of April 21, 1919, on the market for American fresh fruits in Venezuela. The Consul also sent a list of the importers of apples and commission agents in Venezuela. Those interested should ask for Report 120311. The report of the Consul is as follows:

"Though occasionally shipments of pears are received, the only steady demand for American fruits in this district is for apples. The retail price of American apples here is never less than \$0.10 each, but even at this price the demand is fairly

steady though certainly not large. The statistics for 1917 show that fresh fruit was imported to the amount of 50 tons and the value of \$18,000, and it is probable that at least 80 per cent of this fruit consisted of apples. The demand appears to be increasing, and about Christmas time importations are considerable in quantity. The demand is almost exclusively for red apples and they are usually packed in barrels. Fresh fruit is on the free list of the Venezuelan tariff law."

SPANISH FIGS FIND MARKET IN UNITED STATES

More than one-third of the total imports of figs by the United States during 1918 came from the Malaga Consular District of Spain. The quantity imported, 3,351,193 pounds, represents an increase of 621 per cent above the imports of 1917. According to statistics furnished by the American Consul at Malaga about one-fifth of the entire fig crop was exported to this country.

"According to the Customs statistics, exports of dried figs from Malaga during 1918 were as follows: 1,411 tons to the United States; 1,330 tons to France; 377 tons to Cuba; 337 tons to Morocco; 256 tons to England; 164 tons to Gibraltar; 133 tons to Denmark; 80 tons to Norway; 43 tons to the Canaries; 29 tons to Mexico; and 13 tons to Uruguay. The total exports in 1918 were 4,314 tons as against 4,306 tons in 1917.

"The exports of figs declared for export to the United States were valued at \$344,283 in 1918, as against \$44,995 in 1917. Most of the exports to the United States were sent in 56-, 22-, and 10-pound boxes. It is hard to foretell whether Spanish figs will be in as great demand as during the war. This will depend upon the accessibility of the Smyrna market. Exporters are of the opinion that Malaga figs selected and prepared in the right way will continue to find buyers.

"Prices ranged from 24 to 36 pesetas (\$4.63 to \$6.75) per 100 pounds. In the 1917 season they had averaged from 16 to 26 pesetas (\$3.09 to \$5.02) per 100 pounds, and before the war, the prices ranged from 11 to 14 pesetas (\$2.12 to \$2.70) per 100 pounds."

CANAL ZONE EXPORTS BANANAS TO NEW YORK

(From American Consul at Colon, Panama, June 13, 1919)

"It has been 10 years since any bananas were exported from Colon to the United States. Hence it is a matter of no small interest that an American merchant in Colon shipped from Cristobal, Canal Zone, two days ago 1,000 bunches of bananas to New York by a vessel of the Panama

Railroad Steamship Company, and that to-day he is exporting 800 bunches by the same line to New York. The ships of this line have cold-storage space for bringing supplies from the United States for the commissary department in the Canal Zone. Such space will now be utilized in exporting bananas to New York. The bananas are grown up the Chagres River and along the arms of the Gatun Lake just outside the limits of the Canal Zone, where there is a good deal of land that is suitable for growing bananas. While for some time the exports of bananas from this district may not be large, it will be an easy matter to increase the production of this valuable fruit in case it is found to be profitable to export it regularly to the United States, as it is confidently expected that it will be."

MARKET FOR AMERICAN FOODSTUFFS AND SOAP IN VIENNA

On July 7 the Department of State received a cablegram from the American Mission at Paris stating that a strong financial group in Vienna wishes to begin immediately the importation of American foodstuffs and soap. The group therefore desires that quotations on the following articles be telegraphed at once: Lard, meats of all kinds, condensed milk, rice, vegetable oils, and soaps of all kinds. For further particulars ask for report 120612.

NEWFOUNDLAND REMOVES RESTRICTIONS AGAINST IMPORTATION OF FOODSTUFFS

The War Trade Board has announced, for the information of exporters in the United States, that the regulations restricting the importation of foodstuffs into Newfoundland, including the regulation of November 26, 1918, has been cancelled. The foregoing relaxation, however, does not apply to the importation of wheat flour, the regulations covering the importation of which still remains in effect.

EXPORT DUTY ON HIDES, SKINS, WOOL, AND TALLOW IN URUGUAY

According to a cablegram from the American Consul General at Montevideo to the Department of State, under date of July 4, the following official valuations have been fixed for the computation of export duties for the year beginning July 1, 1919, on the following articles per 100 kilos: Dry cattle hides, 68 pesos (\$31.89 per 100 pounds); salted cattle hides and sheep skins, 60 pesos (\$28.14 per cwt.); pickled sheep skins, free of duty; raw and pulled wool, 100 pesos (\$46.90 per cwt.); washed wool, 130 pesos (\$60.97 per cwt.); tallow, 30 pesos (\$14.07 per cwt.). The duties are 4 per cent of the above valuations.

MOVEMENT OF GRAIN TO SEABOARD FOR EXPORT

North Atlantic ports			South Atlantic and Gulf ports		
: Quantity (bushels),			: Quantity (bushels),		
Condition	: week ended--		Port	: week ended--	
	: July 2	: June 25		: July 2	: June 25
Received in	:	:	New Orleans	: 2,928,331	: 3,174,811
elevator	: 5,613,961	: 5,701,194	Port Arthur	: Empty	: Empty
Clearances....	: 4,758,588	: 5,582,421	Texas City..	: Empty	: Empty
Total in ele-	:	:	Galveston ..	: 1,160,470	: 1,384,092
vator at end :	:	:	Total	: 4,088,801	: 4,558,903
of week	: 11,113,502	: 9,867,640			

As indicating the export shipping situation, there is given below the total number of carloads of export freight on hand at the seaboard awaiting clearance, exclusive of bulk grain and coal:

		:Quantity (carloads) for week ended--	
Ports	:	July 2	: June 25
At North Atlantic ports	:	23,081	: 23,526
At South Atlantic and Gulf ports....	:	10,298	: 10,228
At Pacific coast ports	:	3,003	: 3,165
Total	:	36,382	: 36,919

IMPORTS OF CORN INTO NEW YORK FOR WEEK
ENDED JULY 12

On July 7 two shipments of corn amounting to 195,425 bushels arrived at New York from Argentina. On the 8th 231,275 bushels arrived, making the total quantity of corn imported during the week from Argentina 426,700 bushels. The total quantity imported since January 1 was 3,164,881 bushels.

Exports of Meats and Meat Products from
New York City During Week Ended July 12*

(Compiled by Bureau of Markets at New York Custom House)

Commodity	:Weekly exports:	Total since Jan. 1
Beef:	: Pounds	: Pounds
Fresh or frozen	: 1,926,058	: 108,869,153
Canned and pickled	: 2,136,720	: 75,171,370
Lamb and mutton	: ----	: 521,806
Pork:	:	:
Fresh or frozen	: 263,436	: 32,427,342
Dry, salt, and pickled ...	: 8,959,994	: 386,549,943
Bacon, hams, and shoulders..	: 16,798,598	: 403,003,805
Sausage	: 462,602	: 9,422,448
Poultry and game	: 266	: 7,828,073
Lard and lard compounds ...	: 17,903,576	: 416,529,733

*Gross weights given. Manifests pending examination 54. Approxi-

mately 5,000,000 pounds of bacon, hams, and shoulders were shipped to England on July 11; also 1,835,000 pounds of lard. On the same date almost 2,500,000 pounds of dry, salt, and pickled pork were consigned to the Netherlands. Approximately 1,300,000 pounds of beef, 4,000,000 pounds of dry, salt pork, 1,000,000 pounds of bacon and 4,000,000 pounds of lard were consigned to Germany.

On July 7th 1,012 cattle and 38 horses were exported to Belgium. Last week 252 horses and 654 cattle were shipped to France.

Exports of Hay, Grain, and Dairy Products from New York
City During Week Ended July 12

(Compiled by Bureau of Markets at New York Custom House)

HAY AND GRAINS*

	Wheat	Flour	Oats	Barley	Malt	Barley	Rye	Hay
Destination	(bu.)	(bbl.)	(bu.)	(bu.)	(bu.)	(bu.)	(bu.)	(lb.)
Belgium	---	---	70,031	---	7,946	---	---	337,684
France	571,446	37,797	282,000	---	1,646	---	---	---
Netherlands...	---	---	69,866	---	---	---	---	---
Italy	26,900	69,970	---	---	215,115	---	---	---
Scandinavia...	---	---	---	---	8,161	14,460	---	---
United Kingdom...	401,093	67,306	---	144,663	---	---	238,841	---
South America:	---	2,203	---	---	2,956	12,980	---	---
West Indies...	---	25,715	1,456	---	---	---	---	12,053
Misc.	---	100	135,638	---	56,888	29,676	---	---
Total	999,439	203,091	558,991	144,663	292,712	57,116	238,841	349,737

*Gross weights given. Manifests pending examination: Belgium 1; France 9; Italy 5; United Kingdom 14; South America 2; West Indies 6; Miscellaneous 13; Total 50.

DAIRY PRODUCTS**

	Butter	Clec- margarine	Cheese	Condensed	Ev'p'd	Eggs
Destination	(pounds)	(pounds)	(pounds)	milk (lb.)	milk (lb.)	(doz.)
Belgium	---	60,480	13,960	---	432,450	-----
France	---	---	---	336,000	---	-----
Italy	---	17,920	---	12,960	---	-----
Scandinavia....	---	16,584	86,618	---	---	-----
United Kingdom:	1,393,589	102,100	---	8,867,718	3,211,610	146,190
Central America:	1,335	1,000	203	15,680	660	150
South America...	7,715	150	154	36,392	16,144	-----
West Indies ...	75,397	40,524	32,896	318,195	60,168	1,110
Misc.	5,118	1,400	1,034	240,850	48,450	-----
Total	1,983,154	240,158	134,365	9,327,795	3,769,782	147,450
Total since :	:	:	:	:	:	:
January 1...	18,066,794	12,039,533	6,790,448	337,907,237	3,902,566	---

**Gross weights given. Manifests pending examination: Belgium 1;

France 9; Italy 5; United Kingdom 14; Near East 1; Central America 1; South America 3; West Indies 6; Africa 1; Miscellaneous 13; Total 54. On July 11 the largest shipment of butter exported in recent months, 1,393,589 pounds, was forwarded to England. Cheese exports continue to be made chiefly to Scandinavian countries. Sweden imported 84,216 pounds of the total quantity of cheese listed above, including 7,380 pounds of Swiss cheese and 32,412 pounds of Cheddar cheese. Eggs reported above were forwarded chiefly in the month of June.

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REPORTS ON FOREIGN MARKETS FOR AGRICULTURAL PRODUCTS

UNITED STATES DEPARTMENT OF AGRICULTURE
BUREAU OF MARKETS
FOREIGN MARKETING INVESTIGATIONS

WASHINGTON, D. C., JULY 17, 1919

PRELIMINARY REPORT ON CONDITIONS AFFECTING LIVESTOCK, MEATS, AND DAIRY PRODUCTS IN FRANCE

By Turner R. H. Wright, Bureau of Markets, and George A. Bell,
Bureau of Animal Industry, United States Department of Agriculture

INTRODUCTION

In submitting a general report relative to the livestock and meat industries in France, the writers wish to state at the outset that it has been very difficult to obtain accurate information on which to base opinions or from which to draw conclusions. This has been due, first, to the general uncertainty of conditions which has prevailed since the signing of the armistice; second, to the lack of recent statistical data.

The general policy of the French Government since the signing of the armistice has been to discourage the importation of products from foreign countries as much as possible in order to maintain the exchange value of the franc and to encourage the reestablishment and building up of French industries. It would appear that this policy has had a tendency to raise general price levels during the last few months.

THE LIVESTOCK SITUATION

Horses, cattle, sheep, and swine are now admitted to France without tax, and private citizens are allowed to import. Government officials state that livestock can be imported from the United States and that there are no sanitary regulations against such importations. Certain sanitary regulations, however, such as requiring a health certificate, will be effective and regulations no doubt will be formulated from time to time as it may be deemed conditions make them necessary, but the Ministry of Agriculture realizes the need for livestock and livestock products, and it is believed that only the regulations necessary to guard against disease will be made.

NOTE.- Unless otherwise noted, all conversions of foreign prices into U. S. money have been made at the par value of the foreign moneys without regard to current exchange.

HORSES.-- The numbers of horses in France on December 31 of the years 1913, 1914, 1915, 1916, according to the statistics of the French Ministry of Agriculture were as follows:

1913	.....	3,222,080	::	1915	.....	2,209,191
1914	.....	2,205,192	::	1916	.....	2,245,630

These data show a decrease of 1,016,888 animals, or 31½ per cent, from 1913 to 1914. There apparently was an increase of 40,438 animals, or about 2 per cent, from 1914 to 1916. Statistics showing the number of horses in France since 1916 are not available at the present time.

While there is no doubt that there is a shortage of horses, as evidenced by the high prices for which animals suitable for work purposes are selling, and that a greater number could be used to a good advantage, it is doubtful whether the shortage is great enough to interfere very materially with agricultural production. Cattle, both oxen and cows, are being used extensively for work purposes, especially in the central and southern sections. Army horses and mules are being sold to civilians, and it is estimated that from 700,000 to 900,000 eventually will be returned from the various armies. The farm tractor also is being used to a greater extent than before the war.

The horses the writers have seen in France have been, as a rule, in good physical condition and have not shown any lack of feed. It may be stated that in general they are in better average condition than the horses seen in England.

The writers attended a sale of British army horses and mules in Paris on March 17. The mules sold for \$125 to \$300 apiece, which was about 50 per cent higher than mules of the same quality were selling in the United States at the time the writers left there. The horses sold for \$120 to \$500, which was about double what such horses would sell for in the United States.

Good horses of the draft types will sell at the present time for \$400 and up. Only those horses which are unfit for work are sold for meat.

While there is a shortage of horses in France at present, it is not likely that any very large number will be imported from other countries in the immediate future. Shipping space for livestock is difficult to obtain and is needed for other purposes, and no doubt other means of supplying farm power will be utilized as much as possible.

The number of cattle used for work purposes is a factor which should be considered in any consideration of the probable demands for horses from other countries. A large number of cattle, both oxen and cows, are used for work purposes in France. The estimates of the Ministry of Agriculture for June 30, 1918, give the number as follows: Oxen, 1,132,663; Cows, 1,167,626; total, 2,300,289.

About 85 per cent of the work cattle are in the southern half of France and far outnumber the horses in that part of the country. In fact, the number of horses in the southern half of France is less than half the

number of cattle used for work. Not only are cattle used on the farms, but they are used also in the cities for hauling purposes. In the city of Marmande, Department of Lot-et-Garonne a large number of yokes of cows of the Garonnaise breed are used for hauling purposes. The estimates for that Department for 1918 give the number of cows for work as 63,949, the number of oxen for work as 13,418, and the number of horses in 1916 as 12,630.

The cows used for hauling purposes also are used for breeding purposes, and in many instances for the production of milk for human consumption.

This practice of using cattle for work purposes naturally curtails the demand for work horses as farmers who prefer to use horses will turn to the use of cattle when horses are too high priced or difficult to obtain. The prices for which horses and mules are selling at present, however, would justify some trading with the United States if shipping space can be obtained at a reasonable rate.

CATTLE.-- The statistics of the Ministry of Agriculture give the following estimates for the numbers of cattle in France for the years 1913, 1914, 1915, 1916, 1917, and 1918:

1913(December) ... 14,787,710	::	1916(December) ... 12,341,950
1914(December) ... 12,668,243	::	1917 (June) ... 12,443,304
1915(December) ... 12,520,106	::	1918 (June) ... 13,314,856

The decrease from December, 1913, to December, 1914, was 2,119,467 head, or 14½ per cent. The decrease from December, 1914, to June, 1917, was 224,939 head, or 1-3/4 per cent. The increase from June, 1917, to June, 1918, was 871,652 head, or 7 per cent. If we assume that there has been a corresponding increase since June, 1918, and that this rate of increase will continue until June, 1919, the total cattle population in June, 1919, should be about 14,247,000 head, or within about 540,000 of the number in December, 1913.

The numbers of cattle in the 77 Departments, exclusive of the 10 invaded Departments, in 1913, 1914, 1916, and 1918 are as follows:

1913(December) 13,206,690	::	1916(December) 11,616,920
1914(December) 12,020,174	::	1918 (June) 12,641,419

The numbers of cattle in the 10 invaded Departments for the years 1913, 1914, 1916, and 1918 follow:

1913(December) 1,581,020	::	1916(December) 725,030
1914(December) 648,069	::	1918 (June) 673,437

The estimates of the cattle in France on June 30, 1918, by classes, are given as follows:

<u>Bulls</u>		<u>Cows</u>	
Young animals	587,322::	For milk	5,325,178
Bulls in service	187,638::	For work	1,167,626
Improved by fattening. <u>25,982::</u>		Improved by fattening.. <u>160,037</u>	
Total bulls	800,942::	Total	6,652,841

<u>Oxen and Steers</u>		<u>Heifers and Steers</u>	
(Over 30 months old)	::	(Less than 30 months old)	
For work	1,132,663::	For breeding	3,734,932
For slaughter	<u>169,865::</u>	For fattening	<u>227,099</u>
Total	1,302,528::	Total	3,962,031
		:: Calves for slaughter...	596,514

The foregoing estimates for 1918 are given in much greater detail than those for former years; consequently a direct comparison of the numbers of the different classes and ages by years is difficult. A fairly accurate grouping can be made, however, by combining the figures for the young bulls, heifers, and steers under 30 months old and the veal calves. This grouping gives the following estimates for 1913, 1917, and 1918 for comparison:

	<u>December,</u> <u>1913</u>	<u>June,</u> <u>1917</u>	<u>June,</u> <u>1918</u>
Bulls	284,190	214,764	213,620
Steers	1,843,160	1,295,120	1,302,528
Cows	7,794,270	6,238,690	6,652,841
Young an- imals	<u>4,866,090</u>	<u>4,694,730</u>	<u>5,145,857</u>
Total ...	14,787,710	12,443,304	13,314,856

This shows an increase in 1918 as compared with 1917 of 7,488 steers; 414,151 cows, or 6½ per cent; and 451,137 young animals, or 9½ per cent.

This increase in the numbers of young animals was evidenced by the large numbers the writers have seen on the many farms they visited in the various parts of France. One of the most striking features of the cattle situation has been the large numbers of yearling and 2-year-old heifers seen on both the farms of the large land owners and the farms of the peasant farmers. These heifers are for the most part well grown, of good size, and in good condition. In fact, almost all the cattle were in good flesh, having come through the winter in good physical condition. The few exceptions occurred where there was a shortage of hay.

There appears to be an abundance of pasture in all the parts of France visited by the writers, which comprise about one fourth of the departments. The pastures also appear to be in good condition. In many sections the farmers stated that there is a larger percentage of grass-land than before the war, on account of the shortage of labor necessary to care for cultivated crops. This should insure plenty of grass for the summer and fall and plenty of hay for next winter. Grain is not fed so extensively to cattle in France as in the United States, and conse-

quently does not play such an important part in the production of cattle and dairy products.

Cattle of all kinds are selling for very high prices in France. Good cows bring from three to four times as much as similar cows brought before the war. The question of the price of breeding cattle, particularly cows, has been taken up with a good many farmers. In Normandy the writers were told that good young cows were worth from 1,500 to 2,500 francs (\$289.50-482.50) and that before the war cows of the same quality would sell for 500 to 600 francs (\$96.50-115.80). The writers were given practically the same information in the Charolaise and Garonnaise cattle districts. The prices given varied considerably in the various districts, but the relation to prewar prices always was practically the same.

The high prices paid for meat animals do not tempt many of the farmers to sell their good breeding animals. This conclusion is drawn from the statements made by several farmers and from the general quality of the cattle seen at the market at La Villette. It would appear, to judge from the cattle received at the market, that farmers are taking advantage of the high prices to dispose of their older oxen, worn-out cows, and mediocre animals that are not considered good enough for breeding purposes. Very few young cows or heifers have been seen at the market. While a good many calves are being sent to market, the percentage of heifer calves is considerably less than the percentage of bull calves.

The French Government has arranged to import a large number of cattle from the United States. All kinds of livestock are needed greatly in the devastated area. The greatest need, however, seems to be for milk cows and the French Government desires, at the present time, to obtain dairy cattle for this area. The Government, in giving assistance in this area, is planning to import several thousand head from other countries. The plans include the purchase of some cattle in Canada, and it is reported that about 25,000 breeding cattle will be bought from Switzerland. Some grazing cattle also may be imported. Whether or not any considerable number of breeding cattle will be imported by private individuals will depend largely on conditions which develop, especially after the signing of the peace treaty. It would seem that present prices would encourage importation.

SHEEP.-- The estimates of the Ministry of Agriculture of sheep for the years 1913 to 1918 inclusive are as follows:

1913(December)	16,131,390 ::	1916(December)	10,845,280
1914(December)	14,038,361 ::	1917 (June)	10,586,594
1915(December)	12,261,782 ::	1918 (June)	9,496,315

These figures show there has been a continued decrease in sheep. From December 31, 1913, to June 30, 1917, this decrease amounted to 5,544,796 head, or 35 per cent of the total stock. The decrease from June, 1917, to June, 1918, was 1,090,279 head, or more than 10 per cent. The greatest decrease appears to have been in the number of ewes kept for breeding purposes. It should be remembered when considering these figures that the number of sheep in France was decreasing from year to

year even before the war. The writers have not, however, been able to obtain any very satisfactory information as to the cause of this big decrease in the number of sheep. Monsieur Masse, in a report to the Minister of Agriculture on October 17, 1918, gave the annual decrease in the number of sheep in prewar times as 280,000 and attributed the greater rate of decrease during the war to the greater scarcity of shepherds, the necessity of farm women devoting themselves to hard farm labor, and the price paid by the Government for wool, the entire stock of which was requisitioned during the war period.

A comparison of the numbers of sheep and lambs slaughtered at the abattoirs of La Villette, Paris, in 1917 and 1918 and in February, 1918, and February, 1919, seems to indicate that at present there is a tendency toward a decreased marketing of sheep.

Total number slaughtered in 1917	1,038,299
Total number slaughtered in 1918	<u>639,113</u>
Decrease for year	99,186
Number slaughtered during February, 1918 ...	102,404
Number slaughtered during February, 1919 ...	<u>58,292</u>
Decrease for February	44,112

It is thus seen that the decreased slaughtering for February, 1919, is almost equal to half of the decrease for 1918. This would indicate either that the stock of sheep in the country is nearing depletion or that there is a tendency for farmers to hold their stock notwithstanding the prevailing high prices.

The condition of the sheep at the market at La Villette indicates that forage conditions in the sheep-raising sections have been fairly good. Most of the sheep we have seen offered for sale at the market have been in fairly good condition and many of them have appeared as if they were grain-fed. The few flocks seen in the country also appeared to be in good condition. The writers have seen only two or three lots of sheep at La Villette which were in very thin flesh. These came from a mountain section where they are entirely dependent on pasture for forage.

SWINE.-- The estimates for the Ministry of Agriculture give the numbers of swine for the years 1913 to 1918, inclusive, as follows:

1913(December)	7,035,850 ::	1916(December)	4,361,900
1914(December)	5,925,487 ::	1917 (June)	4,200,280
1915(December)	4,909,886 ::	1918 (June)	4,020,897

While the foregoing statistics show a big decrease in the number of swine since 1913, the decrease since 1916 has been comparatively small, and the number could be increased very quickly if conditions which would encourage an increase should develop. A continuation of the present high prices and a favorable season for the production of grain and potatoes no doubt would stimulate a greater production of swine.

The hogs both at the market La Villette and on farms were thinner than most hogs usually in the United States. It is true that the hogs of France are of a bacon type and that fat hogs do not meet the popular demand; yet it appears that the swine industry has been handicapped through a shortage of grain feeds and potatoes. The writers were informed that the shortage of feed caused the marketing of many hogs which otherwise would have been kept for breeding purposes and the marketing of pigs at a lighter weight than usual.

The statistics show there is a decided shortage of both sheep and swine in France. This shortage can be met readily by the importation of meat, pork products, and wool. While some importations of both sheep and swine for breeding purposes may be made, it is very likely that the tendency will be to import the meat, fat, and wool.

THE MEAT SITUATION

There is no meat-packing industry in France such as has been developed in the United States. The writers have been informed that there are a few bacon and ham curing plants, but most of the cities and towns depend on the local abattoirs for their supply of fresh meats. The fresh meat also is handled to a large extent without refrigeration.

The French people, thus, have not been accustomed to eating frozen or chilled meat and for that reason there is a marked prejudice against imported meat. This prejudice may be illustrated by the prices asked for pork at Mouling on April 11. Home-killed fresh pork was offered at one stall in the central market at 5 francs a livre (\$0.875 per pound) while American dressed frozen pork, loins and ribs, were being offered at another stall in the same market for 5 francs a kilo (\$0.44 per pound). This difference did not prevail with dry salt pork, as both local-cured and American-cured sides were being offered at 5 francs a livre (\$0.875 per pound).

The Government is trying to encourage the use of frozen meat in order to conserve French cattle and build up the herds of France as rapidly as possible. It was stated that many of the French soldiers had become accustomed to eating imported meat during the war and that they probably would continue to use imported meat if it could be purchased to advantage. Various officials and others said that the demand for imported meat and meat products probably will continue for four or five years, or until the herds of France have been reestablished on a prewar basis. It appears to the writers, however, that judging from the condition of the herds, the livestock industry of France under favorable conditions may reach the prewar basis in a shorter time.

Butchers at the abattoirs at La Villette said that the people either do not like imported beef or object to it because it carries too much fat or fat that is yellow and rancid and has to be trimmed off and wasted. The frozen meat seen that day, and to which these butchers referred, came from South American plants of a North American concern. These butchers stated also that American cured sides and salt pork, as a rule, were not cured properly and either are too salty or too rancid to meet the French taste. American hams and best grades of bacon, however, meet with approval.

but it was said that these products are too expensive at present for the average family. Cured hams displayed in store windows in Paris have been priced at about 3.75 francs a $\frac{1}{2}$ kilo (\$0.66 per pound).

Government officials and members of the trade informed the writers that the meat imported into France at present is controlled by the Government. All imported frozen meat is sold at prices fixed by the Government, which are considerably lower than the prices which meats killed locally are bringing.

The following statistics, obtained from the Ministry of Agriculture, the Prefecture of Police, and the Prefecture of the Seine, give the numbers of animals slaughtered at the abattoirs at La Villette from 1912 to 1918 and a comparison of the numbers of the different classes slaughtered in February, 1918, and February, 1919.

Animals Slaughtered at La Villette, Paris, 1912-1918

Animal	: 1912	: 1913	: 1914	: 1915	: 1916	: 1917	: 1918
Adult cattle:	222,361:	216,289:	193,963:	158,173:	175,705:	202,133:	184,246
Calves	236,374:	232,754:	199,093:	155,217:	165,927:	175,442:	131,251
Sheep	1,620,374:	1,596,933:	1,123,062:	984,777:	1,030,162:	1,038,299:	939,113
Hogs	298,577:	301,920:	273,931:	288,180:	238,146:	235,864:	177,615

Animals Slaughtered at La Villette, Paris,
during February, 1918 and 1919

Animal	: Feb., 1918	: Feb., 1919
Adult cattle ...:	20,342	: 13,450
Calves	12,641	: 6,222
Sheep	102,402	: 58,292
Hogs	22,076	: 16,386

These figures show a marked decrease in the numbers of calves, hogs, and sheep slaughtered at these abattoirs in 1918 as compared with 1912 and 1913. The most noticeable decrease, however, is shown by the comparison of the numbers of animals slaughtered in February, 1919, as compared with February, 1918. While the actual figures for the numbers of animals slaughtered in March and April are not available, the receipts at the market at La Villette indicate that the same relative decrease has continued notwithstanding the high prices, as shown in the reports of the market at La Villette as given in Reports on Foreign Markets No. 14, page 6. Inasmuch as local livestock prices throughout France are based largely on the market at La Villette, the same conditions probably prevail throughout the country. To judge from what we have seen of farm conditions and La Villette market, it appears that the supply of mature cattle available for slaughter is becoming exhausted and that farmers are keeping their good breeding stock and young females on the farms.

The following statistics, taken from the same sources as the foregoing, show a comparison of prices paid at La Villette in 1913 and at the present time.

Prices of Dressed Carcasses at La Villette Wholesale Market,
Paris, 1913-1919

(Prices given per 100 pounds, net)						
Period	Beeves	Bulls	Calves	Sheep	Hogs	
	\$	\$	\$	\$	\$	
1913 (av. for year):	14.09	12.34	20.40	20.13	15.67	
1914 (range)	12.08--17.16	11.38--14.44	13.48--22.94	16.55--24.69	12.08--15.06	
1915 (range)	15.67--20.75	15.50--18.91	17.86--25.56	17.07--25.39	15.32--19.96	
1916 (range)	15.72--23.55	15.67--21.62	17.77--31.95	18.47--33.44	24.16--31.16	
Apr. 13, 1919 (range)	36.76--63.91	36.76--57.78	43.77--84.04	65.66--109.43	70.03--74.94	
Apr. 24, 1919 (range)	40.27--67.41	40.27--59.53	52.53--87.54	63.91--105.05	68.81--77.56	

These figures show a decided increase in prices since 1916. Average prices for 1917 and 1918 are not available.

The maximum prices fixed by the Government for the sale of stock at La Villette from December 16, 1918, to March 8, 1919, follow.

Fixed Maximum Prices of Dressed Carcasses at La Villette
Market for the Period December 16, 1918, to March 8, 1919

(Prices given per 100 pounds net)			
Animal	Grade 1	Grade 2	Grade 3
Beeves	\$35.02	\$34.14	\$32.39
Cows	35.02	34.14	31.52
Bulls	34.14	33.25	32.39
Veal (calves)....	43.77	42.02	38.51
Sheep	54.28	49.02	43.77
Hogs	42.90	42.02	

The writers were informed that Government control of meat prices, with the exception of imported meats, had been discontinued on March 8, since which time prices at La Villette have had a tendency to rise. During the war the Government controlled the prices of livestock sold for meat purposes and the weight at which cattle could be slaughtered, but this control has been suspended.

Inasmuch as livestock prices throughout France seem to be based on the Paris market, high prices for meat animals prevail in country districts as well as in Paris.

POULTRY AND EGGS

The consensus of the opinions of persons with whom we have talked is that the number of chickens now in France is considerably lower than the number before the war. It has been impossible to obtain any accurate information on the number in the country or the decrease in number as compared with 1913. There is a general complaint that chickens are scarce.

Dressed chickens are high in price, those of average size retailing at 15 to 21 francs, or at the average rate of exchange prevailing during the past month, at about \$2.65 to \$3.70 apiece. Eggs have been

selling at retail during the past month at 4 to 6 francs, or \$0.70 to \$1.05 a dozen. Dressed geese sell at retail for about 3.65 francs, or approximately \$0.65 a pound.

BUTTER AND CHEESE

Butter and cheese are both scarce as compared with prewar times and are high in price. First-class butter retails at 10 to 15 francs a kilo, or from about \$0.75 to \$1.15 a pound.

Cheese varies greatly in price, according to the kind, the retail prices ranging from about \$0.75 to \$1 a pound.

THE MILK SITUATION

Fresh milk is very scarce in the cities and very difficult for the average person to obtain. In spite of this scarcity, however, it does not appear to be very high priced as compared with other food articles; most of the farmers interviewed stated that they sold their milk for 40 to 50 centimes a liter, or for about \$0.07 to \$0.09 a quart. The retail price, wherever we could obtain it, was from 80 centimes to 1 franc a liter (\$0.14-0.18 a quart).

A Government official stated that the condensed milk imported into France during the war was largely for army consumption, and that the quantity imported in the future very likely would be considerably less than the quantity imported during the war period. Apparently, however, there is quite a large civilian consumption of condensed and evaporated milk. The milk served with coffee or chocolate at the hotels in Paris and other cities visited by the writers has been, for the most part, condensed or evaporated.

There also is a large quantity of condensed milk on sale in Paris and other cities, and a very noticeable increase during the last month in the number of stores having it for sale, particularly in Paris. The writers were informed by a grocer at Moulins, Department of Allier, that there was an increasing demand for condensed milk and that, according to his opinion, it was difficult to obtain on account of transportation facilities. He stated, however, that conditions were improving and that he expected, in the future, to obtain condensed milk in sufficient quantities for his trade. It seems probable that France will continue to import large quantities of condensed milk until the supply of fresh milk is increased materially.

The large numbers of yearling and 2-year-old heifers seen on farms in the different parts of France would indicate that with favorable conditions the production of milk should approach something like the prewar basis within the next two years. The high prices for food also very likely will encourage farmers to give their cattle good care, which would tend toward maximum milk production.

REPORTS ON FOREIGN MARKETS FOR AGRICULTURAL PRODUCTS

UNITED STATES DEPARTMENT OF AGRICULTURE
BUREAU OF MARKETS
FOREIGN MARKETING INVESTIGATIONS

WASHINGTON, D. C., JULY 24, 1919

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NOTE

IN THESE REPORTS ALL CONVERSIONS OF FOREIGN PRICES INTO U. S. MONEY HAVE BEEN MADE AT THE PAR VALUE OF THE FOREIGN MONIES WITHOUT REGARD TO CURRENT EXCHANGE.

AMERICAN FRUITS SHOULD BE CAREFULLY GRADED FOR BRITISH MARKETS

(From American Agricultural Trade Commissioner. Edward A. Foley, London, July 1, 1919)

Grading American Apples

"Too much stress can not be laid on the fact that those who expect to sell apples in the markets of Great Britain must carefully grade their produce.

"Last year, because of extraordinary conditions, it happened that ungraded produce from the United States brought a fair price here, but the conditions which made this possible no longer exist. The British public at that time, having been deprived of foreign apples since the beginning of the war, was apple-hungry and eagerly purchased apples regardless of quality. This hunger has been appeased by large shipments from America, Tasmania, and other places, and the normal market conditions now prevail.

"It is well to note that the Tasmanian Parliament, appreciating the importance of apple grading, has issued regulations regarding the export of fruit. Stress is laid on the fact that it is believed that the standardization of fruit will result in more satisfactory returns and enable Tasmania the better to meet competition.

"The chief points in the regulations are as follows: Cases must be legibly and indelibly marked with one or other of the following brands, or marks: 'Extra Fancy,' 'Fancy,' 'C Grade,' 'Ungraded;' the size of the fruit; the varieties (if not known, to be so marked), the name and business address of the person or firm who packed the fruit, or if repacked, of the person or firm who repacked it.

"Apples branded 'Extra Fancy' or 'Fancy' must not be less in size than 2 1/4 inches; apples less than 2 1/4 inches but not less than 2 inches must be shipped in cases branded 'C Grade.' No case shall contain any apple below the size branded on such case, but may contain apples one-quarter inch larger in size. 'Extra Fancy' apples must consist of sound, clean, well-formed fruit, free from all insect, fungus, and other blemishes. Full-colored varieties of this brand shall have each apple colored to the extent of not less than two-thirds of its skin with good red coloring. Striped varieties must have not less than half their surfaces colored with distinct red stripes or streaks. Yellow and green varieties shall be even in color, but may show flushes of another color where such are natural to their respective kinds.

"This action of the Tasmanian Parliament is a forcible reminder of the constant advice of the Department of Agriculture to those who would successfully handle and market fruit; to wit, 'Grade your fruit,'

Cape Oranges on English Market

"For the time being the season for American oranges will be closed as the Cape oranges have begun to arrive in quantities and until freight rates are lowered it will be impossible for American oranges to compete with this source of supply. Experienced handlers of oranges here expect to see oranges at 30 shillings (\$7.29) per box by the end of the month."

RESUMPTION OF TRADE WITH GERMANY

The War Trade Board Section of the Department of State announced on July 14, 1919, that a General Enemy Trade License has been issued authorizing all persons in the United States, on and after July 14, 1919, to trade and communicate with persons residing in Germany and to trade and communicate with all persons with whom trade and communication is prohibited by the Trading with the Enemy Act; subject, however, to the following specific limitations and exceptions, to wit:

1. The above-mentioned general license does not authorize the importation into the United States from Germany or elsewhere of dyes, dye-stuffs, potash, drugs or chemicals which have been produced or manufactured in Germany.

2. The above-mentioned general license does not modify or affect in any respect present restrictions against trade and communication between the United States and Hungary or that portion of Russia under the control of the Bolshevik authorities.

3. The above-mentioned general license does not authorize trade with respect to any property which heretofore, pursuant to the provisions of the Trading with the Enemy Act as amended, has been reported to the Alien Property Custodian or should have been so reported to him, or any property which heretofore, pursuant to the provisions of said Act, the Alien Property Custodian has seized or has required to be conveyed, transferred, assigned, delivered or paid over to him.

Exports to and imports from Germany may take place under Special Export License RAC No. 77 and General Import License FBF No. 37 as announced in War Trade Board Rulings 803 and 804 respectively.

ESTABLISHMENT BY GERMANY OF A CENTRAL OFFICE FOR FOREIGN TRADE

The "Frankfurter Zeitung" for May 11, 1919, "learns from Berlin that a Central Office has been established by the German Government for the furtherance of import and export trade, especially the export of German goods, in order to create a supply of bills of exchange, and also for the distribution of the imports of foodstuffs and raw materials.

"The Office is to carry out its duties according to the full powers entrusted to it by the Ministers Gothein, Schmidt, and Wissel, and is to be under the direction of Under-Secretary Topfer, of the Foreign Office. It is also to have the duty of furthering in every way all efforts for the provision of State and private credit abroad, and of investigating and taking advantage of all opportunities of attaining a revival of German commerce with foreign countries.

"The Director of this Office states that the first action of this "Economic Committee" will be to grant to each exporter from May 15 onwards

who exports goods for payment in foreign currency, 20 per cent of the proceeds in bills in the following manner: The total equivalent value of the export in bills of exchange is to be placed at the disposal of the Reichsbank and the exporter is to receive a credit certificate for 20 per cent of the amount. Against this certificate, the Reichsbank is to issue bills to him, if he imports goods, the entry of which is permitted by a competent Office. If no use is made of this right within four months, the certificate becomes invalid. The certificates are transferable. If the sale to the foreign country is in mark currency, the credit of 20 per cent of the proceeds in bills will only be available if the proceeds of the sale are actually paid in foreign currency.

"In order to encourage the import of raw materials, it is intended to place a share fixed from time to time of the imported raw stuffs at the disposal of the importer, who provides bills himself, whether by means of credit, or by use of the above-mentioned 20 per cent, for manufacture possibly even beyond his contingent within the compulsory administration. The completion of half-manufactured articles is to be encouraged in the fullest measure, and import permits will be given for goods for which proof can be given that they will be wholly or partly reexported in a fully manufactured state."

TEMPORARY RESTRICTION ON EXPORTS BY JULIAN VENETIA GOVERNMENT

According to a cablegram from the American Consul at Trieste, Italy, to the Department of State, under date of July 12, 1919, the Julian Venetia Government prohibited temporarily exports to countries other than Italy. The restriction does not apply to goods of foreign origin in transit for which documents giving origin can be shown.

EGYPTIAN ONION CROP SITUATION

(From American Vice Consul in Charge, Alexandria, Egypt, May 24, 1919)

"The question of the export of onions is still precarious. The local railway authorities have arranged for special vegetable trains to run between the chief onion growing centers and Alexandria and are thus attempting to save the crop, at least partially, from total destruction. This crop is sown in Egypt about November 10 of each year and becomes ripe for collection in the first few days of April. Drastic measures regarding transportation have been taken. The crop, however, is considered to be practically lost."

RAW FUSEL OIL ON MARKET

An exporter of raw fusel oil in Prague, Czechoslovakia, desires to be placed in touch with American buyers. If interested, ask for report 120930.

MARKET FOR COTTONSEED OIL AND RICE

An importer at Brailia, Roumania, desires cable quotations on two cargoes of prime summer yellow and summer white cottonseed oil and several cargoes of rice. If interested, ask for report 120738.

MOVEMENT AND SUPPLY OF ARGENTINE GRAIN

According to a dispatch to the "London Times" for June 14, 1919, wheat shipments from Buenos Aires, Argentina, for the week ended June 12 were as follows:

Exported to -	Wheat	Corn	Oats	Linseed
	Bushels	Bushels	Bushels	Bushels
Belgium .....	.....	.....	176,000	.....
France	144,000	.....	.....	.....
For orders	308,000	72,000	.....	.....
Italy .....	.....	112,000	11,000	.....
Netherlands ...	256,000	224,000	112,000	1,259,771
Scandinavia ...	.....	144,000	.....	196,839
United Kingdom.	72,000	134,000	.....	.....
United States ..	.....	512,000	.....	1,417,243
All others	1,092,000	323,000	.....	629,836
Total	1,872,000	1,576,000	238,000	3,503,739

The visible supply of Argentine grain at Buenos Aires on June 12 was as follows: Wheat, 4,041,756 bushels, an increase of 367,433 bushels; corn, 3,346,267 bushels, a decrease of 519,019 bushels; oats, 2,066,812 bushels, a decrease of 379,468 bushels; linseed, 5,703,339 bushels, an increase of 196,239 bushels.

WHEAT SITUATION IN URUGUAY

According to a report of the American Consul at Montevideo to the Department of State, under date of May 15, 1919, "the Uruguayan wheat market, which has an exportable surplus of some 100,000 tons, has been very dull. Last year's surplus, little of which has been exported, has been for the most part converted into flour. However, as mills are finding difficulty in disposing of their product to Brazil, which is the principal foreign consumer, they are showing little interest in new wheat. On the other hand, the Uruguayan producer refuses to sell his wheat except at his own price, which is so high as to make the Uruguayan export price higher than that obtained in Buenos Aires. The market is now awaiting international developments in the hope that the opening up of new markets in Europe will create a demand for Uruguayan wheat."

EMBARGO ON EXPORT OF FORMOSA RICE TO JAPAN PARTIALLY REMOVED

According to the American Consul at Taihoku, Formosa, to the Department of State, dated June 5, 1919, the Taiwan Government-General promulgated a regulation in January, 1919, prohibiting the export of rice, in order to maintain the quantity necessary for home consumption, except that exports to Japan, of quantities not in excess of the amount imported from foreign countries, were permitted. Now that the first crop is appearing, however, the Government-General has decided to permit the export to Japan of not more than 300,000 bags, or 200,000 koku (992,000 bushels), and has so informed the Rice Exporters' Guild. The allotment of the amount to be exported by each merchant will be left to the discretion of the Guild which is, however, required to report to the Government its decision regarding such allotment.

BETTER OUTLOOK FOR DAIRY PRODUCTS IN DENMARK

(From American Consul at Odense, Denmark, May 27, 1919)

"The outlook for the export possibilities of dairy products is greatly improved. It seems that butter sales can again be made to Germany at a good price, namely 7 crowns per kilo (\$0.85 per pound). Prices offered by England also are now more satisfactory than they were during the war, so it is expected that this market will again be of importance. The increase in milk production and the increased use of margarine here now make it possible to export greater quantities of dairy products."

EFFECT OF OIL-CAKE SHORTAGE IN DENMARK ON DAIRY SITUATION

According to the Cottonseed Oil Magazine for June, 1919, before the war an average feed per day for a good 1,000-pound dairy cow was: Oil cake, $4\frac{1}{2}$ pounds; beets, 110 pounds; straw and hay, $11\frac{1}{2}$ pounds; total, 126 pounds, containing about 31 pounds of dry matter. Such a cow would give about 25 pounds of milk per day. The average daily yield for the whole of Denmark just before the war was about 17 pounds. It is estimated that the present average is not above 10 pounds, possibly below. The whole difference is in the lack of nitrogenous feed; that is, oil cakes, as these have not been imported for the past year.

It is well known to agricultural chemists that the manurial value of excreta, both liquid and solid, is much more from cattle with nitrogenous feeds than without. Thus the cessation of oil-cake imports to Denmark is not only decreasing the milk and butter supply but is reducing the fertility of the soil.

Danish agricultural chemists have almost made up their minds to contest the present theory that the percentage of fat in cows' milk depends altogether upon the breed of the cow and not upon the character of the feed. Extensive experiments are now in progress, which seem to show that during the past year or more when Danish cattle have been deprived of their usual

oil-cake rations the average fat content of all the milk of the country has declined from 3.75 to 3.5 per cent. Some curious results are developing in these experiments. For instance, a few individual dairies show an actual increase in fat percentage. All that the experimenters are willing to say at this time is that the radical change of feed during such an extended period has produced "abnormal" results.

RESTRICTION ON IMPORTATION OF CATTLE INTO CANADA

The Dominion Department of Agriculture has announced that on and after July 2, 1919, all American cattle imported into Canada for exhibition purposes must be accompanied by a tuberculin test chart signed by an officer of the Bureau of Animal Industry, United States Department of Agriculture, certifying that the cattle have been tested by him within 60 days of the date of entry into Canada.

The amendment was considered advisable owing to the fact that similar changes have been made in the American regulations. After July 1, 1919, all Canadian cattle imported into the United States for exhibition purposes must be accompanied by a tuberculin test chart.

COST OF SHIPPING CATTLE TO FRANCE

The following information was furnished by the Bureau of Animal Industry as to the charges on a recent shipment of 500 head of Canadian steers to Havre, France, through the port of New York:

Cost of ocean transportation	\$100.00	per head	
Feed in stockyards	2.85	"	"
Railroad charges from Canada	9.10	"	"
Feed of steers and transportation ...			
and feed of caretakers	11.80	"	"
Marine insurance	5.90	"	"
Total	\$129.65	"	"

EXPORT OF LIVESTOCK TO ANTWERP

On July 17 the Steamship Toronto (New York) loaded 630 head of livestock to Belgium, including cows, steers, bulls, and horses.

FROZEN HORSE MEAT NOT IN FAVOR IN FRANCE

In the western part of the United States there are large numbers of light-weight horses for which there is no ready sale. Therefore, with a view to finding a possible outlet for these animals in Europe inquiries have been made through various sources as to the present demand for horse-meat.

The American Commercial Attache at Paris has forwarded to the Department of Commerce a comprehensive report of the situation in France, from which the following information is taken.

The French people have eaten horsemeat for many years. Before the world war large numbers of live horses were imported from Argentina every year for slaughter. These horses were very small, weighing about 880 pounds each, and were delivered in France at \$57.90. About 65,000 horses are butchered in Paris alone each year. At the present time horses no longer fit for service in the American, French, and British armies are being sold to French buyers, and a large proportion of these animals are slaughtered. In one day recently 800 horses, many from the various armies, arrived for slaughter.

Most of the meat consumed in France is in a fresh state; and there is a decided prejudice against frozen meat of any kind. Before the war no frozen meat was imported into France. However, large quantities were brought in by the Government during the war, and it was said that for the next two years at least, the French Government will have to continue to import frozen meat, owing to the depletion of the herds.

No frozen meat of any kind may be imported into France except by the Government. Frozen horsemeat has never been imported, though there were no objections to the importation of certain qualities of pickled horsemeat.

France, being largely an agricultural country, was able to supply its own needs with fresh meat. The prejudice against the use of frozen meat has been partially overcome in the large cities. In the country, it is said, the people do not know what frozen meat looks like. This prejudice is not readily apparent to Americans, accustomed, as they are, to the wide-spread use of frozen meats, brought to us in refrigerator cars, and preserved by the most up-to-date refrigerating methods until the time they reach the consumer. Since the war, facilities for transporting frozen meat have been used in France, but the large central markets in the cities lack adequate cold-storage facilities, and this situation is aggravated in the case of the smaller retailers, who have practically no cold chambers to keep the meat fresh. These conditions, considered in connection with the fact that the French have all their lives been accustomed to fresh meat, largely explains their prejudice against frozen meats.

There are local regulations regarding the sale of horsemeat. For example no horsemeat slaughtered outside Paris will be allowed to enter the city. Horses must be slaughtered within the city limits.

The wholesale price in Paris for the best cuts of fresh horsemeat in May were about \$0.22 a pound. The poorer cuts, such as the sides and neck are sold for a very low price, and even if frozen horsemeat could be imported from the United States, it probably would be unprofitable to bring in any but the better cuts.

FOODSTUFFS SITUATION IN NORWAY

According to a report from The American Trade Commissioner at Christiania, Norway, to the Department of Commerce, under date of May 17, 1919, "Imports continue heavy. Large cargoes of grain have lately arrived from Argentina and the United States. The greater part of the wheat and maize shipments have been brought in from the former country, while the latter is the source of most of the rye.

"New maximum prices for a number of commodities have recently been published, among which are the following:

"For American picnic hams the new maximum prices on May 15 were: Wholesale, \$0.45 per pound; retail, \$0.51 per pound. In addition for smoked picnic hams there may be added \$0.06 per pound to the wholesale price, and up to \$0.07 per pound for the retail price.

"American cheese is priced at \$0.70 per pound wholesale, and \$0.80 per pound retail.

"According to the Tidens Tegn," for May 16, three steamers carrying cargoes of sugar totaling 39,000 tons are expected from Java soon. These shipments will be sufficient to meet the country's needs for at least six months, and it seems that rationing may be abolished almost any time."

PRICES FOR FOODSTUFFS IN AUSTRALIA CONTINUE TO ADVANCE

According to a report from the American Consul General at Sydney, Australia, to the Department of State, dated May 19, 1919, prices continue to advance instead of decline. Recent sales of potatoes on the market realized \$3.27 per bushel; corn \$1.75 per bushel; oat hay \$48.60 per ton; lucern hay, \$41.10 per ton. All varieties of fruit, such as lemons, oranges, apples, pears, and peaches, are very expensive.

PRICES OF ITALIAN TOMATO PRESERVES AND CHEESE*

(From American Consul at Florence, June 15, 1919)

	Per pound
Tomato preserves (f.o.b. Parma):	
In tins	\$0.364 - 0.438
In barrels .....	.325
Reggiano cheese (f.o.b. Reggio-Emilia):	
Vecchio (1916) .....	.405
Year (1917) .....	.405

*See note on page 1 regarding conversion of foreign money.

PRICES OF BOURBON VANILLA

(From the American Consul at Tananarivo, Madagascar, March 28, 1919)

"According to the 'Tribune,' published at Tananarivo (Madagascar), there has been a marked increase in the price of Bourbon vanilla on the

Paris market. Recent quotations are given at Frs. 20 per kilo (\$1.75 per pound). It would also appear that a planter in the island of Reunion is of the opinion that prices in the near future will reach Frs. 30 per kilo (\$2.63 per pound) as in 1914, shortly previous to the war."

LIST OF IMPORTERS OF RAW COTTON IN GENOA, ITALY

A list of the importers of raw cotton in Genoa, Italy, may be obtained upon application to the Bureau of Markets by asking for report 120909.

MOVEMENT OF EGYPTIAN COTTON

The following statistics on the movement of Egyptian cotton have been taken from the report of the American Vice Consul in Charge at Alexandria, Egypt, to the Department of State, dated May 24, 1919:

"The Ministry of Agriculture of Egypt has announced the formation of a Cotton Research Board with a view to assisting cultivators to improve the quality and yield of cotton grown in Egypt and to reduce losses due to pest and other causes.

"The Cotton Control Commission will cease to function as of from July 31, 1919. All further obligations to tender cotton to the commission will come to an end.

"Cotton movements during the month of April as shown in the weekly returns of the Alexandria General Produce Association were: Arrivals in Alexandria from the interior of 6,468 bales as opposed to 57,017 bales for March, 1919. Exports to England 13,624 bales and to the Continent 15,563 bales. Stocks on hand available for shipment on April 25 amounted to 558,730 bales."

PROPOSED COTTON SYNDICATE IN CZECHO-SLOVAKIA

The "Neue Freie Presse" (Vienna) for April 15, 1919, stated that in Czecho-Slovakia negotiations have taken place, with the co-operation of Government departments, concerning the formation of a cotton-spinners' syndicate.

"It is proposed to purchase 60,000 bales of American cotton, and two representatives of the Syndicate will proceed to America for this purpose. It is estimated that this quantity will afford employment to the spinning mills for six months, by reducing their working to 15 or 20 per cent. A Czech banking concern would take over the guarantee for the payment of the credit necessary for the cotton, while the spinning-mills would have to pay a cash deposit and accept liability for the remainder, according to the number of spindles.

"It has been suggested that the weavers should also form a syndicate and endeavor to procure yarn from Italy until sufficient cotton arrives from America. Numerous foreign offers have been received in Prague; in Vienna also offers of cotton and yarn have been received from the former enemy countries and from Switzerland. No contracts, however, have been concluded as import permits are not granted to firms. Thus, a large Vienna firm had recently to refuse an Italian offer of \$3,860,000 worth of washing fabrics, although it was proposed that public utility organizations should participate."

FACILITIES FOR HANDLING COTTON AT VENICE

A communication regarding the facilities of Venice, Italy, as a port for discharging, storing and forwarding American cotton has been forwarded by the American Consul at Venice to the Department of State, under date of May 10, 1919. The following excerpts from the letter contain information of interest to the American cotton trade:

"To the easy ways of unloading already existing, new ones will soon be added as well as new areas, in order to facilitate the loading and unloading of the steamers. New machinery has already been ordered for the old existing port and the construction of the new Porto Industriale of Venice, which will cover a vast area, furnished with all the necessary machinery, big store houses, and important railway communications will soon be started.

"The merchandise when once arrived in Venice, will be readily unloaded and shipped to the Veneto, Lombardy, to Switzerland, Bavaria, etc., and the opening of the canal between Milan and Venice will allow cotton fabrics to be shipped to Lombardy at a lower rate than by railway.

"The American cottons could be shipped directly from the United States to Venice, where they would undergo only one operation, which could be the unloading on cars or on barges for further shipment to the hinterland.

"Venice has a specially good climate for preserving cotton, there is a lack of dust and the temperature is moderate except when the east damp winds are blowing.

"If American exporters would like to introduce their goods on this market and take advantage of the favorable moment for studying and developing their plans, this is the right time to do so."

RESTRICTION REMOVED ON EXPORT OF WOOL TO UNITED STATES BY SOUTH AFRICA

According to a cablegram from the American Consul General at London to the Department of State, under date of July 8, 1919, export licenses for shipment of wool from South Africa to the United States will be issued freely upon application to the Government of South Africa.

For the fiscal year of 1914 the United States imported only 676,658 pounds of wool from South Africa. Since that time there has been no import duty on wool, and large quantities have been imported each year, the largest amount, 73,836,556 pounds, imported in 1916, representing nearly one-fifth of our total imports of wool that year.

The following table gives the imports of wool by the United States from British South Africa for the fiscal years 1914 to 1918, inclusive:

1914	676,658 pounds :	1917	32,016,319 pounds
1915	25,307,899 pounds :	1918	61,037,776 pounds
1916	73,836,556 pounds :		

In 1916 nearly one-half of the South African exports of wool were sent to the United States; in 1917 about one-fourth came to this country. These imports consisted principally of clothing wools.

FOURTH SERIES OF LONDON WOOL AUCTIONS

The following special reports for the Bureau of Markets on the fourth series of London wool auctions were received from the American Consul General at London through the Department of State:

The fourth series of the auctions of colonial wools at London opened on July 14 with 8,500 bales. The bidding of the home trade was somewhat reserved, and it was only when French and Belgian buyers were operating among merinos that firm prices were obtained for good wools. Mediums showed some irregularity, while poor sorts declined about 5 per cent. The best sorts of crossbreds sold well, but inferior and faulty qualities were 5 per cent lower. Among the Melbourne grease wools a few merinos brought 61d. (\$1.22) and crossbreds 42½d. (\$0.85).

At the auctions on the 15th 8,000 bales were offered. Victorian Merinos sold up to 75½d. (\$1.51) per pound for the best scoured; 50d. (\$1.00) for greasy combings; 45d. (\$0.90) for greasy pieces and necks; and 54d. (\$1.08) per pound for broken. Eight hundred and eighty bales of New Zealand good scoured wools marked "scdnsh" in square sold at 74d. (\$1.48). The best merino combings brought 59d. (\$1.18); halfbreds, 66½d. (\$1.33); pieces, 62½d. (\$1.25) per pound. New Zealand greasy crossbreds, mainly medium and lower grades, ranged from 20½ to 35d. (\$0.41 to \$0.70) per pound.

On the 16th 7,500 bales were offered. Victorian scoured merinos under marks "Clyde" and "Gibb" brought 79 and 78d. (\$1.58 and \$1.56) per pound, respectively. Greasy merinos varied from 33½ to 48½d. (\$0.67 to \$0.97) per pound. The best greasy crossbreds lambs brought 27½d. (\$0.55). In a lot of 1,100 bales of New Zealand wool marked "S C D Taytim" in square, the best scoured merinos sold for 74d. (\$1.48) per pound, crossbreds brought 62½d. (\$1.25), and pieces ranged from 65½ to 70½d. (\$1.31 to \$1.41). In 1,000 bales of free cape greasy wools offered the best sold at prices about

10 per cent lower than the last options. Inferior lots were mostly withdrawn.

At the auction on the 17th 7,000 bales were offered. Sydney clips, comprising an assortment of carbonizing wools, ranged from 32 to 43d. (\$0.64 to \$0.86). Some of the best scoured merino clothing wools marked "cwc" brought 67d. (\$1.34). Victorian greasy merinos sold as high as 46d. (\$0.92). New Zealand greasy cross-breeds brought 40½d. (\$0.81). In 1,000 bales of free cape wools superior clips of greasy and scoured wools brought 43 and 72½d. (\$0.86 and \$1.45) per pound, respectively.

MOVEMENT OF GRAIN TO SEABOARD FOR EXPORT

North Atlantic ports			South Atlantic and Gulf ports		
: Quantity (bushels),			: Quantity (bushels),		
: week ended--			: Port : week ended--		
: July 9 : July 2			: July 9 : July 2		
Received in :	:	:	New Orleans :	2,376,503:	2,928,531
elevator....:	4,193,350:	5,613,961	Port Arthur :	Empty :	Empty
Clearances....:	3,538,852:	4,758,588	Texas City. :	do :	do
Total in ele-:	:	:	Galveston.. :	1,191,117:	1,160,470
vator at end:	:	:	Total ... :	4,067,620:	4,028,801
of week:	11,426,714:	11,113,502	:	:	:

As indicating the export shipping situation, there is given below the total number of carloads of export freight on hand at the seaboard awaiting clearance, exclusive of bulk grain and coal:

Ports	: Quantity (carloads) for week ended--	
	: July 9	: July 2
At North Atlantic ports	23,593	23,081
At South Atlantic and Gulf ports ...	10,691	10,298
At Pacific coast ports	2,950	3,003
Total	37,234	36,382

STOCKS OF COFFEE AT RIO DE JANEIRO AND SANTOS

According to the London Times for July 1, 1919, the stocks of coffee on hand June 28 at Rio de Janeiro were 427,000 bags as compared with 724,000 bags at the same time last year. At Santos the stock was 2,184,000 bags on June 12. At the same time last year the stocks amounted to 2,853,000 bags.

Imports of Grain and Livestock into New York
for the Week Ended July 12

On July 15, 2 ships with a total cargo of 292,150 bushels of corn arrived at New York from Argentina; 102,306 bushels arrived on July 17, and on July 19th 74,565 bushels were entered. Total for week, 469,021 bushels; total since January 1st 3,633,902 bushels.

On July 19, the following livestock arrived from England consigned to destinations as far west as Idaho: 44 yearling Down Rams; 25 yearling Cotswold Rams; 1 yearling Suffolk Ram; 3 yearling Suffolk Sows; 31 cattle; 305 sheep, 80 heifers; 1 boar and 6 horses.

Exports of Meats and Meat Products from
New York City During Week Ended July 19*

(Compiled by Bureau of Markets at New York Custom House)

Commodity	: Weekly exports :	: Total since Jan. 1 :	: Total since July 1 :
Beef:	: Pounds :	: Pounds :	: Pounds :
Fresh or frozen	: 455,521 :	: 109,324,674 :	: 2,479,427 :
Canned and pickled	: 1,169,011 :	: 76,340,381 :	: 2,685,884 :
Lamb and mutton	: --- :	: 521,806 :	: --- :
Pork:	: :	: :	: :
Fresh or frozen	: 1,817,451 :	: 34,244,793 :	: 2,196,506 :
Dry, salt, and pickled	: 12,154,145 :	: 398,704,088 :	: 25,352,193 :
Bacon, hams, and shoulders ..	: 15,854,123 :	: 418,857,933 :	: 424,059,753 :
Sausage	: 54,349 :	: 9,470,797 :	: 526,482 :
Poultry and game	: --- :	: 7,228,073 :	: 266 :
Lard and lard compounds	: 5,788,779 :	: 422,318,512 :	: 26,076,437 :

*Gross weights given. Manifests pending examination 36. On July 17 approximately 2,000,000 pounds of lard, 2,500,000 pounds of dry, salt, and pickled pork, and 242,000 pounds of canned beef were shipped to Austria. Included in the above totals are exports of approximately 11,000,000 pounds of hams, bacons, and shoulders, shipped to England in the latter half of June and the first weeks in July.

Exports of Hay, Grain, and Dairy Products from New York
City During Week Ended July 19.

(Compiled by Bureau of Markets at New York Custom House)

HAY AND GRAINS*

	Wheat	Flour	Oats	Barley	Malt	Malt	Rye	Hay
Destination:	(bu.)	(bbl.)	(bu.)	(bu.)	(bu.)	(bu.)	(bu.)	(lb.)
Belgium.....	----	----	611,937	25,575	---	---	---	---
France.....	----	47,976	---	---	---	---	---	---
Netherlands:	----	----	---	420,003	---	15,615	---	---
Italy.....	----	54,953	---	---	---	---	---	---
United Kingdom...	122,453	52,287	---	213,275	---	---	126,920	---
Near East...	----	----	---	---	3,624	---	---	---
West Indies:	50	12,141	4,613	---	1,890	---	---	185,453
South America...	----	13,503	---	---	---	---	---	---
Miscellaneous.....	----	351	---	---	3,388	---	---	---
Total.....	122,503	181,191	616,550	658,953	8,902	15,615	126,920	185,453
Total since July 1	722,146	372,085	855,553	876,781	371,981	124,463	126,920	862,635

*Gross weights given. Manifests pending examination: France 3; Netherlands 1; United Kingdom 12; Near East 2; West Indies 3; South America 3; Miscellaneous 13; Total 37. Owing to the marine strike, clearances of foreign destined vessels decreased by one-third in the past week. On July 15 the shipment of 420,003 bushels of barley listed above went forward to the Netherlands.

DAIRY PRODUCTS**

	Butter	Oleo-	Cheese	Condensed	Ev'p'd	Eggs
Destination	(pounds)	margarine	(pounds)	milk (lb.)	milk (lb.)	(doz.)
Belgium.....	----	----	3,200	----	----	----
France.....	----	4,500	----	446,654	149,737	----
Italy.....	6,097	----	----	1,492,276	1,652,911	----
Scandinavia....	----	----	3,204	538	----	----
United Kingdom:	----	583,014	----	3,784,618	2,742,397	51,000
South America...	8,525	1,000	3,900	72,847	16,000	----
West Indies....	54,034	4,378	44,758	557,434	44,488	2,010
Africa	----	----	----	58,000	34,000	----
Miscellaneous.....	----	248	490	175,590	600	----
Total	68,756	593,140	55,552	6,387,957	4,640,133	53,010
Total since January 1	18,135,550	12,632,673	6,846,000	349,135,327	3,955,576	

**Gross weights given. Manifests pending examination: France 2; Scandinavia 1; United Kingdom 12; Near East 2; Central America 1; South America 3; West Indies 3; Africa 3; Miscellaneous 9; Total 36. Owing to the marine strike, clearances of foreign-ddestined vessels decreased by one-third in the past two weeks. Exports of butter were mainly to the West Indies. The entire total of 54,034 pounds was shipped within the past 10 days. Shipments of over a million pounds of both condensed and evaporated milk were made to Italy on July 15. Eggs amounting to 27,000 dozen were shipped to England on July 18.

REPORTS ON FOREIGN MARKETS FOR AGRICULTURAL PRODUCTS

UNITED STATES DEPARTMENT OF AGRICULTURE BUREAU OF MARKETS FOREIGN MARKETING INVESTIGATIONS

WASHINGTON, D. C., JULY 31, 1919

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NOTE

IN THESE REPORTS ALL CONVERSIONS OF FOREIGN PRICES INTO U. S. MONEY HAVE BEEN MADE AT THE PAR VALUE OF THE FOREIGN MONEYS WITHOUT REGARD TO CURRENT EXCHANGE.

MARKET FOR AMERICAN FRUITS AND VEGETABLES IN GREAT BRITAIN*

(From American Agricultural Trade Commissioner
Edward A. Foley, London, July 10, 1919)

In a survey of the markets for American fruits and vegetables in Great Britain, the following facts should be borne in mind:

(1) The war has undone in five years a great deal of the pioneer work in the introduction of American fruits into Great Britain.

(2) Ocean tonnage for the transportation of produce is scarce, and its movement is erratic.

(3) Foodstuffs are still regulated in Great Britain by the Food Controller and the Board of Import Restriction.

American farm products are popular, and their reintroduction is merely a matter of American skill in handling the trade.

At present there is no opening for American garden truck or berries, owing to the fact that the Netherlands and other near-by countries are flooding the English markets with produce that formerly found its way to the Central Empires. This has already called forth a protest from English growers, whose produce is mostly grown under glass, with largely increased overhead expenses, due to the high prices of labor, glass, fertilizer, and transportation, and can not compete successfully with the cheaper product from abroad.

In fruit lines, however, American produce is in line for greatly increased sales.

Popularity of American Apples

Our apples arrive at a time when the English markets are bare of fruit, and their popularity is evidenced by the fact that in the early part of the year over 1,000,000 barrels were imported from the United States. Much of this produce sold at or near the control price of 56 shillings (\$13.61) per cwt. of 112 pounds.

The present fixed prices for imported apples are as follows:

Size of container	Maximum price	
	When sold by package Per barrel	When sold by weight Per cwt.
Barrels containing not less than 112 pounds	s. d. 58 4 (\$14.17)	s. 56 (\$13.61)
Barrels containing not less than 130 pounds	67 8 (\$16.44)	56 (\$13.61)
Boxes containing not less than 38 pounds	19 9 (\$ 4.80)	56 (\$13.61)
All other classes	-----	56 (\$13.61)

*See note on page 1 regarding conversion of foreign money.

Oranges are equally popular and are selling at a good price. Pears, peaches, cherries, and apricots have not as yet appeared on the local markets, and these markets will have to be developed next year, when transportation across the Atlantic has improved, and freight rates have been lowered. For the present apples and oranges are Great Britain's principal fruit imports, and a few observations on the handling of these commodities may be helpful to the American trade.

In England the apple is regarded as being a necessity not only for food but for health purposes as well. The local crop, whatever it may be, is entirely inadequate to supply the need of an all-the-year-round commodity. This year the local crop will be unusually light, owing to a drought in May and June. The Australian and Tasmanian apple crops have already been disposed of. Upon the United States and Canada, therefore, will fall the duty of supplying the apple needs of the coming season. The local crop will be disposed of before the American crop comes on the market.

Restrictions on Imported Fruit

On June 28 the Food Controller extended the license for the importation of apples and oranges from September 1, 1919, to March 1, 1920. Pears have not been licensed, as they are considered a luxury, and the present condition of British exchange requires that no money be sent abroad for luxuries. Much effort is being expended by local importers looking towards the modifications of these regulations.

The present control price on apples will remain until September 1, when it may be modified. This is of importance to the American exporter. If the price is maintained as in the past, the home-grown apple crop will be marketed as rapidly as possible, as the grower will not take a chance of deterioration, storage charges, etc., when he knows that his product can not be sold at an advance over the fixed price.

Graded Fruit Demanded

With the heavy freight charges only good fruit will bring a profit to the grower. Over 80 per cent of the fruit sent to Great Britain is on consignment and is sold at auction after a thorough inspection. This means that first of all the fruit must be correctly graded, as stated in Reports on Foreign Markets No. 18, page 2. Ungraded fruit will surely go to the huckster, and the shipper will have merely a freight bill to pay instead of making a profit at the end of the transaction.

Apples Should be Inspected

And equal in importance to grading is condition on arrival. Shippers at a distance from the Atlantic seaboard should have a representative at the seaboard to inspect their product. A sea trip is hard on produce, and if any signs of deterioration are noticed the fruit should be sold on the home markets.

This representative should also oversee the removal of the fruit from the cars and its final disposition on the vessel. In many instances large consignments were left on the wharves in hot weather. The fruit becomes heated, deterioration sets in, which, increasing rapidly during the sea trip, renders the fruit practically unmarketable on arrival.

The fruit should be again inspected on arrival in Great Britain by someone acquainted with the local markets. If the market is glutted, the fruit should be diverted immediately to the point where it will bring the best price. This diversion often means the difference between a loss and a profit on a consignment. The agent at the port of entry should also see that the goods are handled properly after arrival. There is a great deal of congestion at the docks of the different ports, especially at Liverpool, labor conditions are uncertain and will probably remain so during the coming fruit season.

The shipper must keep himself informed of the conditions of freight at the different ports. To allow perishable fruit to run into one of these blockades spells disaster.

Much American bacon lately has been lost at Liverpool, and fruit most certainly is not to be considered in the same class, so far as keeping qualities are concerned.

The British market in apples favors barrels instead of boxes, and care should be taken that the pack is firm.

Orange Boxes Should be Wired

In the case of oranges the regular box is satisfactory, but the boxes should either be wired at both ends and in the middle or wired twice halfway between the middle and ends. Three consignments recently inspected in the auctions here showed that the nails had pulled and the top slats had quite broken off. In some cases the boxes had been patched, but in others no attempt had been made to patch, and the fruit in the boxes had been removed. In one consignment alone the loss from improper containers ran between 25 and 30 per cent. Where ends had been wired, there was absolutely no loss from this source.

Importance of Foreign Exchange

Great care and attention must be paid to exchange, as produce is sold for English money, which in turn must be used for the purchase of American exchange. This difference in exchange, varying as it does from day to day, will on close margin sales have an appreciable effect on the profit of any of these transactions.

Those who are not acquainted with the English trade should be cautious in their dealings, for success in the English markets is beset with pitfalls for the newcomer.

AMERICAN APPLES PREFERRED IN ARGENTINA

According to the "Fruit, Flower, and Vegetable Trades' Journal" for May 17, 1919, American varieties of apples, Rome, King, Spitzenberg, Stayman, Jonathan, and Delicious, were in demand in Buenos Aires, Argentina, during the past seasons.

These apples were shipped from the Wenatchee Valley of Washington, and were considered superior not only to any other foreign apples but also to those grown in Argentina. Apples from the Eastern States were represented by the Ben Davis, a variety seen generally upon the dining cars, but used more for culinary purposes in Buenos Aires, and shipped to the interior towns. The importation of apples by Argentina increased nearly 600 per cent from 1912 to 1917. The imports of apples by Argentina from the United States for the fiscal years 1912 to 1918 were as follows:

1912	8,464 barrels	:	1916	44,003 barrels
1913	7,239 barrels	:	1917	58,453 barrels
1914	36,266 barrels	:	1918	29,176 barrels
1915	49,179 barrels	:		

MARKET FOR PRESERVES, JAMS, AND JELLIES
IN CIENFUEGOS, CUBA

(From American Consul at Cienfuegos, Cuba, June 26, 1919)

"The local demand for American canned pears and peaches is good and increasing, rapidly displacing the Spanish products, which until recently controlled the entire Cuban market, and included also plums, cherries, apricots, figs, and other minor fruits. Excepting pears and peaches, the Spanish product still predominates, though the demand has very much decreased. Formerly a well-known English brand of preserves and jellies was also sold here, but there is none on the market now, which is understood to be due to the increased price.

"Preserves canned locally consist entirely of native fruits, such as the mango, guava, orange, pineapple, coconuts, and others of less importance. In all probability these will never be supplanted.

"General opinion inclines to the belief that a market in this territory depends to a large extent upon cost to the consumer. It is also assumed that labels in Spanish would attract more attention and arouse greater interest and confidence than if in English."

Those interested may obtain a list of the principal wholesale dealers and commission agents in preserves, jams, and jellies at Cienfuegos, by asking for report 120713.

RICE EXPORT SITUATION IN SIAM

In view of the restrictions placed on the rice trade in various countries of the Orient, the following excerpts from a review by the American Vice Consul at Bangkok of the rice situation in Siam will be of value to the trade. A review of the Siamese rice trade in 1918 appeared in Reports on Foreign Markets No. 3, page 10, and the foreign rice situation was reviewed in Reports No. 8, page 2.

"The heavy demand for Siam rice from the British Straits Settlements, Netherlands East Indies, and Japan during January of this year was continued throughout the following months of February and March, causing the total rice exports through the port of Bangkok to reach the unprecedented figures of 413,013 tons of 2,000 pounds for these three months, against 255,898 tons for the corresponding three months of 1918, 316,722 tons for 1917, and 339,447 tons for 1916.

"The destinations and quantities of the rice shipments through the port of Bangkok for November and December of 1918 and for January, February, and March of the current year are given in the following table:

Exports of Rice from Siam from November, 1918 to March, 1919

(Quantities given in tons of 2,000 pounds)						
Exported to	: November : 1918	: December : 1918	: January : 1919	: February : 1919	: March : 1919	
British Malay States,	:	:	:	:	:	
Straits Settlements,	:	:	:	:	:	
and Netherlands India	: 34,636	: 65,173	: 97,194	: 46,989	: 69,545	
China, Japan, and	:	:	:	:	:	
Hongkong	: 18,522	: 28,357	: 41,460	: 73,032	: 62,710	
Europe, including Port	:	:	:	:	:	
Said (for orders) and	:	:	:	:	:	
Alexandria	: ----	: ----	: 11,201	: ----	: 9,688	
Other countries	: 11	: 54	: 11	: 8	: 1.175	
Total	: 53,169	: 93,584	: 149,866	: 120,029	: 143,118	

"Hitherto practically all the Siam rice destined for the Netherlands East Indies was shipped to Singapore, and subsequently reexported to the former country, but owing to such reexports being restricted by the Government of the Straits Settlements, the Government of the Dutch Indies sent its own ships direct to Siam for rice, and 7 of these vessels were expected to arrive at Batavia near the end of February with rice from Siam. During March, 24 Japanese ships of 27,648 tons, and 5 Dutch ships of 16,299 tons sailed from the port of Bangkok, and it is reported that of the 143,119 tons of rice which left Bangkok during that month, Japan took the largest share, then Netherlands Indies and Singapore. According to the Bangkok customs returns, Japan has hitherto only been an occasional buyer of rice in the Siamese market,

taking only about 274 short tons in the fiscal year 1914-15 and 1,767 tons in 1917-18, while considerable quantities of rice have been shipped from Bangkok to the Netherlands Indies each year, amounting to 25,782 tons during the fiscal year ended March 31, 1917, and 40,488 tons in 1918. On the other hand, Singapore and Hongkong, up to the present year, have practically monopolized the distribution of Siamese rice in the Far East, the shipments from Bangkok to the former port amounting to 698,132 tons, and to the latter 449,945 tons or a total for both ports of 1,148,077 tons out of the total rice exports from Bangkok, amounting to 1,249,676 tons for the fiscal year ended March 31, 1918. In the foregoing statistics the term "rice" includes all sorts of rice products.

"Owing to the fact that the bulk of the rice exports from Bangkok went direct to Java and Japan, very little cargo was offered for Singapore and Hongkong, with the result that freight rates declined from \$0.68 in January to \$0.30 Mexican per cwt. in the early part of March to Singapore, and from \$0.98 to \$0.53 per cwt. to Hongkong.

"During the early part of January of this year the Food Controller for the British Straits Settlements visited Siam for purpose of studying the rice situation. The results of his observation are summed up as follows:

"When India ceased supplying the Netherlands East Indies and Japan, with a rush the buyers for those countries turned to Siam and Saigon with the inevitable result that prices of those rices rose to figures hitherto unknown.

"Rice came in during the first quarter of this year up to and over our allowed quantity from Burma and Siam according to our requirements, but in the middle of March we were suddenly informed from India that for the further nine months of 1919 our supply from India would be confined to 61,000 tons, a bare 7,000 tons a month in place of 13,000, meaning a reduction in our imported supply of over 54,000 tons.

"The estimated exportable surplus from Siam and Indo-China is 1,500,000 tons for 1919. Of this amount the Straits Settlements require for a year 330,000 tons, including for 1919 the deficiency of 54,000 tons from India. This leaves a total of 1,170,000 tons available for export to Japan and the Netherlands East Indies. With India cut off as a source of supply we estimate that of this 1,170,000 tons the Netherlands East Indies will require 500,000 tons at least, while Japan's demand is not expected to be less than 600,000 tons. The 1,170,000 tons are therefore reduced to a bare surplus of 70,000 tons.

"From Siam alone over 344,000 tons were exported during January, February, and March. Of this amount the Straits Settlements received 69,000 tons.

"If this rate of export is kept up until the end of the year, Siam will have exported a total of 600,000 tons over and above the actual amount available for export. It can be assumed that 500,000 tons will be available from Saigon. This can be placed against the

600,000 tons mentioned, but in any case both Siam and Saigon at the present rate of buying and export will be exhausted before the end of the year.

Price of Rice in Siam

"At the end of March, 1919, white rice was quoted at from \$4.79 to \$4.93 per cwt. ex wharf, Bangkok, as compared with \$4.31 to \$4.44 per cwt. in January of the same year. The March prices for large broken 1A rice ranged from \$4.73 to \$4.88 Mexican per cwt., as compared with \$5.48 to \$5.63 Mexican per cwt. in January; 1C rice, \$3.98 to \$4.35, against \$5.03 to \$5.18 in January; small broken 3C rice, \$3.75 to \$3.79, against \$4.28 to \$4.43 in January; while rice meal also declined from \$1.31 and \$1.43 in the latter month to \$1.13 and \$1.20 Mexican in March. There were no shipments of rice from Siam to the United States during the three months under review."

LARGE SURPLUS OF CEREALS IN ARGENTINA

That Argentina has a large surplus of cereals is shown in the report of the American Consul General to the Department of State, dated May 20, 1919. The Consul General says:

"Some of the more reliable papers estimate a surplus of cereals in Argentina of 5,000,000 tons at the end of the fiscal year, June 30, 1919. This includes a stock of 1,000,000 tons stored in stations and warehouses in the Bahia Blanca zone, and the important daily newspaper, 'La Nacion,' states there is a like amount in that region on the farms without storage.

"Since landlords generally have granted better rental contracts whereby the tenant farmers are assured of better living conditions, agitation, very acute for several weeks, among this class of labor throughout the grain belt, is gradually dying down. The unrest covered a wide area, and farm work practically came to a stop, either voluntarily on the part of the workers or by threats of the more belligerent. As a result, the final corn harvest is not yet completed. The wet weather of the past few weeks has also deteriorated the crop somewhat, as evidenced by the low grades reaching this market, and incidentally, holding down the price."

FINLAND NEEDS AMERICAN COTTON AND FOODSTUFFS

The Finnish Central Chamber of Commerce furnished to the American Consul at Helsingfors the following information regarding Finland's needs of raw materials and foodstuffs:

There is in Finland a serious shortage of raw materials. There is some cotton available for the textile mills, but much more is needed and here again is a possible market for the American product. Most of the

material for the woolen factories came from Russia before the war. Now Finland has to turn to other markets farther away unless conditions in Russia become normal soon.

Finnish agriculture also needs many kinds of imported goods, for instance, artificial manure, and, in order to build up the dairy industry, cattle feed.

In the Finnish import trade, foodstuffs held an important place before the war. In normal times, grain, flour, and colonial products amounted to more than one-third of the total value of imports. Expressed in percentage, they constituted 39.5 per cent of the total in 1910, 37.7 per cent in 1912, and 38.3 per cent in 1913. During the years 1911 to 1915, imports of grain, flour, and groats aggregated nearly 771,610,000 pounds a year, being about 50 per cent of these foodstuffs used in the country. As the import trade in these products ceased almost altogether in 1917 and 1918 because of unsettled world conditions, the country was thrown into great distress through famine. How to obtain foodstuffs thus became the most important question in Finnish foreign trade. The United States as an important producer of foodstuffs has an extensive market in Finland. Even after peace it is safe to predict that Finland will import large quantities of wheat flour, grain, and sugar from the United States. There will also be a demand for fruits, both fresh and dried, vegetables, fats and oils, needed as raw materials in the margarine trade, which had reached a position of some importance before the war.

In prewar times, butter was sold principally to England. With the return of normal conditions, it is expected seed exports will increase. Seed from Finland is said to be of an exceedingly good quality.

Sawn timber has been the most important article of export from Finland, amounting to more than half of all Finnish exports. Box boards, for instance, could be expected to sell in the United States and the next most important articles of export, paper pulp and paper, could probably find a market there.

Imports and Exports of Cotton by United Kingdom
During the Week Ended June 26 and from January 1 to June 26, 1919

Kind	Imports			Exports		
	Week	Jan. 1		Week	Jan. 1	
	ended	to		ended	to	
	June 26	June 26		June 26	June 26	
	Bales	Bales		Bales	Bales	
American	64,528	1,253,449	:	600	7,730	:
Brazilian	400	11,506	:	---	---	:
East Indian	4,620	61,406	:	605	13,971	:
Egyptian	13,818	230,068	:	676	27,856	:
Miscellaneous	190*	107,735**	:	165	370	:
Total	83,556	1,664,164	:	2,046	50,438	:

--From British "Board of Trade Journal," July 3, 1919

*Including 139 bales British West Indian.

**Including 3,712 bales British West Indian, 3,318 bales British West African, 5,269 bales British East African, and 4,380 bales Foreign East African.

CABLED REPORTS ON JULY SERIES OF LONDON WOOL AUCTIONS

The following special cabled reports on the July series of the London wool auctions were obtained for the Bureau of Markets from the American Consul General at London:

At the London wool auctions of July 22d 6,500 bales were offered. Greasy Sydney wools brought 55½d. (\$1.11) per pound; the best combings 43½d. (\$0.87), pieces 42d. (\$0.84); broken 42½d. (\$0.85); necks and other greasy fleece 53d. (\$1.06); crossbred 43d. (\$0.86); scoured New Zealands 61d. (\$1.22); greasy 41½d. (\$0.83) per pound.

Allotments for Belgium and France at the current auctions were increased to 17,000 and 30,000 bales, respectively.

On July 23d 5,000 bales were offered. Sydney greasy merino combings brought as high as 55d. (\$1.10) per pound. Pieces sold up to 39d. (\$0.78); greasy merino lambs' wool varied from 26 to 40d. (\$0.52 to \$0.80); Victorian greasy merino combings brought from 45½ to 57d. (\$0.91 to \$1.14); 2,255 bales of Punta Arenas free greasy crossbred clips found a ready sale, the best parcels bringing 43d. (\$0.85) per pound.

CONTROL OF CHEESE CONTINUED BY BRITISH GOVERNMENT

The British "National Food Journal" for July 9 states that the controlled distribution of Government imported cheese and of British hard whole-milk cheese purchased for the Pool will be continued until further notice.

Maximum first-hand prices for whole milk cheese in June and July have been fixed as follows: Manufactured on and after June 1 to June 30 (inclusive): In England, Wales and Ireland, \$0.343 per pound; in Scotland, \$0.363 per pound. Manufactured on and after July 1 to July 31 (inclusive): In England and Wales, \$0.426 per pound; in Scotland, \$0.363 per pound.

DRAFT HORSES SHIPPED TO BELGIUM

On July 18 twenty very good horses of the draft type were shipped to Antwerp, Belgium, from the port of New York.

LIVESTOCK SLAUGHTERED AT MONTEVIDEO

(From American Consul at Montevideo, Uruguay, May 15, 1919)

During April the killings at the three packing houses at Montevideo, Uruguay, were as follows: 60,909 cattle; 51,975 sheep; and 1,131 hogs. At one of these plants, 60 per cent of the cattle were frozen and 40 per cent were canned.

The average price paid by the packers for cattle during April was \$0.06 per pound, a slight increase over the March price.

SPECIAL REPORT ON THE LIVESTOCK SITUATION IN FRANCE

"A preliminary report on conditions affecting livestock, meats, and dairy products in France" has been issued as a supplement to Reports on Foreign Markets No. 17. This is the second in the series of special reports on the livestock situation in Europe, made by Messrs. Wright and Bell of the United States Department of Agriculture. The supplement is for distribution to those interested and copies may be obtained upon application to the Bureau of Markets.

AMERICAN TRADE INCREASES VALUE OF CURRENCY IN PARAGUAY

The British "Board of Trade Journal" for June 5, 1919, publishes a report from the British Charge d'Affaires at Asuncion, Paraguay, which shows the effect the influx of American industry has upon commerce. The report in part says:

"The three American meat-packing concerns are now practically complete, and other American interests are contemplated. All these interests bring the Americans more in contact with the country than formerly, and are not without influence upon trade. The operations of the meat-packing companies are already so considerable that the financial business of the country has recently undergone great change. They introduce a relatively large amount of gold, with the result that more local business is done in gold. The trade balance has been favorable for the last few years, and the value of the Paraguayan paper currency has greatly increased, the exchange in February, 1919, being \$17.00 Paraguayan currency to \$1.00 American currency, as against \$33.00 to the \$1.00 in February, 1918. As the prices of imported goods have been largely maintained, the appreciation of the currency has a depressing influence on trade."

The total exports from the United States to Paraguay amount to far more than the total imports, our exports for the fiscal year 1918 being valued at \$670,706, while our imports from that country totaled only \$67,797. The following table gives the principal imports by the United States from Paraguay for the fiscal year ended June 30, 1918:

Article	:	Quantity	:	Value
	:	<u>Pounds</u>	:	
Cattle hides	:	28,385	:	\$ 8,876
Sheepskins	:	4,714	:	1,320
India rubber	:	<u>7,938</u>	:	<u>3,105</u>
Total	:	41,037	:	13,301

"TO ORDER" SHIPMENTS PERMITTED

The War Trade Board Section of the Department of State announced on July 14 that henceforth consignments may be made "to order" under Special Export Licenses RAC-77. (W.T.B.R. 803, issued July 14, 1919) and RAC-42 (W.T.B.R. 810, issued July 14, 1919). Collectors of Customs have been advised that it is no longer necessary for them to obtain the name of the actual consignee in the country of destination in permitting shipments to go forward under the aforesaid Special Export Licenses.

Exporters desiring to consign "to order" shipments which do not fall within the terms of the above-mentioned Special Export Licenses may apply to the War Trade Board Section for individual export licenses, showing on their applications, instead of the name of the consignee, the words "to order."

The regulations herein set forth are in no way applicable to the various cases in which special consignment is required as, for example:

(1) Consignment to the American Relief Administration in Danzig, for transshipment to Poland (War Trade Board Ruling 691, issued April 11, 1919);

(2) Consignment to the Commission Commerciale Czecho-Slovaque, Hamburg, for transshipment to Czecho-Slovakia (War Trade Board Ruling 790, issued June 24, 1919);

(3) All consignments to Finland, Lithuania, Latvia, and Esthonia (War Trade Board Rulings 590, issued February 11, 1919; 695, issued April 14, 1919; and 676, issued April 1, 1919.)

EXPORT OF FOODSTUFFS PROHIBITED BY FRANCE

A shortage of foodstuffs and poor crop prospects in France have brought about addition of the following agricultural commodities to the list of prohibited exports, according to a cablegram from the Commercial Attache at Paris to the Department of Commerce, dated July 18. The list is as follows: Fresh and refrigerated meats, ham and salted meats, sausage products, ox jowl, dressed poultry, tinned meats, animal fats, except fish oils; margarine and other food fats, eggs, condensed milk, cheese, butter, rotten cattle bones, barley, grain and flour, groats and semolina groats, semolina pastes, Italian pastes, oil seeds, oil fruits, sugar, confitures, pure fish oils, vegetable edible fats, oil cakes, brewery residues.

TRADE NOTES FROM AUSTRALIA

(From American Consul General at Sydney, May 19, 1919)

Customs' Decision

"An important Customs' tariff decision has recently been announced by the Commonwealth Customs Department to the effect that values when assessed upon imported merchandise must be those current at the time of

export, instead of when the merchandise was purchased. This opinion of the High Court reverses a former decision by the South Australian Court."

Pillaging Merchandise

A well-known importer said that American shippers should insure against pillaging of shipments in transit, which is said to be carried on here very extensively, the losses running well into hundreds of thousands of dollars annually.

PRICES OF POTASH IN NORWAY

According to a cablegram from the American Trade Commissioner at Christiania, Norway, to the Department of Commerce, under date of July 5, 1919, Norway has imported 16,067 tons of potash since January 1. The prices at the source were not obtainable, but the prices quoted to consumers were as follows:

20 per cent K ₂ O	\$52.80 per ton
40 per cent K ₂ O	91.12 per ton

Most of the potash was bought from the Krupp syndicate at Berlin.

FOREIGN LOANS TO BELGIUM*

(From British "Board of Trade Journal," for July 3, 1919)

During the first six months after the Armistice the Belgian Government was able to secure the following loans in foreign countries and internally:

- (1) 19,000,000 (\$43,798,500) from the British Government for the purpose of reconstruction, and for the payment of manufactured produce and raw material of industry of the United Kingdom.
- (2) 225,000,000 francs (\$43,425,000) from the French Government on the same conditions as the credit granted by H. M. Government.
- (3) \$20,000,000 from the Canadian Government on conditions similar to those formulated by H. M. Government.
- (4) £4,000,000 (\$19,466,000) from a consortium of British banks, which may subsequently be increased to a larger sum. This credit was opened for three months at the current rate of discount (that is, $3\frac{1}{2}$ per cent), plus $3/8$ per cent acceptance commission, to be renewable three times, so that the credit will last one year.
- (5) £10,000,000 (\$48,665,000) from a consortium of American banks. It is understood that the rate of interest asked for by these American banks is about 7 per cent, as compared with approximately 5 per cent charged by London Banks.

*See note on page 1 regarding conversion of foreign money.

(6) £1,500,000 (\$7,299,750) from a well-known British company, which might subsequently be increased to a larger sum. This credit is renewable after six months. The interest is to be paid at the private rate of discount ruling when the Bills are drawn, plus stamp duty on the Bill and $1\frac{1}{2}$ per cent commission, which is to include Banker's acceptance commission.

(7) 3,500,000 francs (\$675,500) from the Internal and External Loan issued by the Belgian Government. This loan is issued at 95 per cent and will bear interest at the rate of 5 per cent per annum. Provision is made for an annual Sinking Fund amounting to $\frac{1}{2}$ per cent of the total issued, out of which purchase of stock will be made in the open market at the current rate of the day. The action of the Sinking Fund will, however, be suspended when the price rises above par. Bonds can be repaid at par before June 1, 1934. Interest will be free of all State and Municipal taxes.

It is also understood that the Belgian Government is negotiating with other countries with a view to securing credits for the purpose of reconstructing their industries for a total of more than \$100,000,000.

MOVEMENT OF GRAIN TO SEABOARD FOR EXPORT

North Atlantic ports		:: South Atlantic and Gulf ports	
: Quantity (bushels), ::		: Quantity (bushels),	
: week ended-- ::		Port : week ended--	
: July 16 : July 9 ::		: July 15 : July 9	
Received in	:	New Orleans	: 2,887,512: 2,876,503
elevator	: 3,744,828: 4,193,350:	Port Arthur	: Empty : Empty
Clearances ...	: 4,914,724: 3,583,852:	Texas City	: do : do
Total in ele-	:	Galveston..	: 1,500,473: 1,191,117
vator at end :	:	Total ...	: 4,387,985: 4,067,620
of week	: 10,503,037: 11,426,714::		

As indicating the export shipping situation, there is given below the total number of carloads of export freight on hand at the seaboard awaiting clearance, exclusive of bulk grain and coal:

Ports	: Quantity (carloads) for week ended--	
	: July 16	: July 9
At North Atlantic ports	22,325	23,593
At South Atlantic and Gulf ports...	10,367	10,691
At Pacific coast ports	2,547	2,950
Total	35,239	37,234

IMPORTS OF DAIRY PRODUCTS AND GRAIN INTO NEW YORK DURING WEEK ENDED JULY 26

On July 26th 27,679 pounds of cheese arrived at New York from Genoa, Italy.

Three cargoes of corn, amounting to 276,663 bushels, arrived at New York on July 22 from Argentina, and on July 26th 123,342 bushels also from Argentina were entered. Total during week 400,005 bushels; total since January 1st 4,033,905 bushels.

Exports of Meats and Meat Products from New York City During Week Ended July 26*

(Compiled by Bureau of Markets at New York Custom House)

Commodity	Weekly exports	Total since Jan. 1
Beef:	Pounds	Pounds
Fresh or frozen	3,526,078	112,850,752
Canned and pickled	11,347,561	77,687,942
Lamb and mutton	2,186	523,992
Pork:		
Fresh or frozen	94,041	34,338,834
Dry, salt, and pickled	6,501,921	405,206,009
Bacon, hams, and shoulders...	7,937,142	426,845,075
Sausage	14,191	9,490,988
Poultry and game	159,610	7,937,683
Lard and lard compounds	8,037,013	430,355,525

*Gross weights given. Manifests pending examination 45. On July 22 shipments amounting to 541,000 pounds of canned beef, 1,566,000 pounds of bacons, hams and shoulders, 1,052,000 pounds of lard, and 1,130,000 of dry, salt, and pickled pork, were made to Germany. Over 4,000,000 pounds of lard and approximately 4,000,000 pounds of dry, salt, and pickled pork were shipped to Scandinavian countries, and 436,998 pounds of corned beef went forward to Denmark. On July 26th 603 cattle and 129 horses were exported to England, while on July 16 41 breeding hogs were shipped to South America.

Exports of Hay, Grain, and Dairy Products from New York
City During Week Ended July 26.

(Compiled by Bureau of Markets at New York Custom House)

HAY AND GRAINS*

Destination:	Wheat (bu.)	Flour (bbl.)	Oats (bu.)	Barley (bu.)	Malt (bu.)	Malt (bu.)	Rye (bu.)	Hay (lb.)
Belgium.....	---	---	134,152	---	---	---	---	---
France.....	---	115	---	---	---	---	---	---
Italy.....	---	65,941	---	---	---	---	---	---
Scandinavia.....	---	15	---	14,064	10,398	17,557	---	---
United Kingdom...	69,995	43,513	250,000	49,997	---	---	---	---
Central America...	---	12	---	---	---	---	---	---
South America...	---	11,839	---	---	19,328	---	---	6,055
West Indies.....	---	10,399	12,976	---	---	---	---	145,583
Africa.....	---	8,078	---	---	---	---	---	---
Total.....	69,995	139,912	447,128	64,061	29,726	17,557	---	151,638
Total since July 1	722,146	511,997	1,302,681	940,842	401,707	142,020	126,920	1,014,273

*Gross weights given. Manifests pending examination: Belgium 2; France 7; Italy 1; United Kingdom 17; South America 4; West Indies 1; Africa 1; Miscellaneous 1. With the practical termination of the marine strike last Friday clearances from the port of New York again became normal. The wheat total listed above went forward to England on June 25. On July 26 a shipment of 57,143 barrels of flour was consigned to Italy.

DAIRY PRODUCTS**

Destination	Butter (pounds)	Oleomargarine (pounds)	Cheese (pounds)	Condensed milk (lb.)	Ev'p'd milk (lb.)	Eggs (doz.)
France.....	---	---	---	224,000	---	---
Italy.....	---	---	---	1,601,165	877,435	---
Scandinavia.....	---	11,109	191,412	56,000	9,750	30
United Kingdom.....	---	28,000	22,000	1,732,290	2,932,357	156,450
Near East.....	---	---	---	242,500	---	---
Central America.....	10,400	3,000	5,728	29,777	22,535	---
South America.....	---	---	---	25,887	39,480	---
West Indies.....	25,249	3,880	9,206	606,411	9,215	900
Africa.....	4,707	---	3,209	14,430	1,995	---
Miscellaneous.....	480,852	---	---	633,982	286,675	---
Total.....	521,208	45,989	231,555	5,216,442	4,179,442	157,380
Total since January 1	18,656,758	12,678,662	7,077,555	358,531,211	4,112,956	---

** Gross weights given. Manifests pending examination: Belgium 2; France 6; Italy 1; Scandinavia 1; United Kingdom 16; South America 4; West Indies 1; Africa 2; Miscellaneous 12; Total 45. With the practical termination of the marine strike last Friday clearances of foreign destined vessels again became normal. Included in the miscellaneous column are 480,742 pounds of butter, which was shipped to the Netherlands on July 16. During the past week 44,760 pounds of Cheddar cheese were consigned to Denmark; 10,080 pounds of unfilled, 21,638 of Cheddar cheese, 38,260 pounds of Swiss cheese, and 10,936 pounds of Daisies were exported to Sweden. On July 21st 156,450 dozen eggs were forwarded to England.